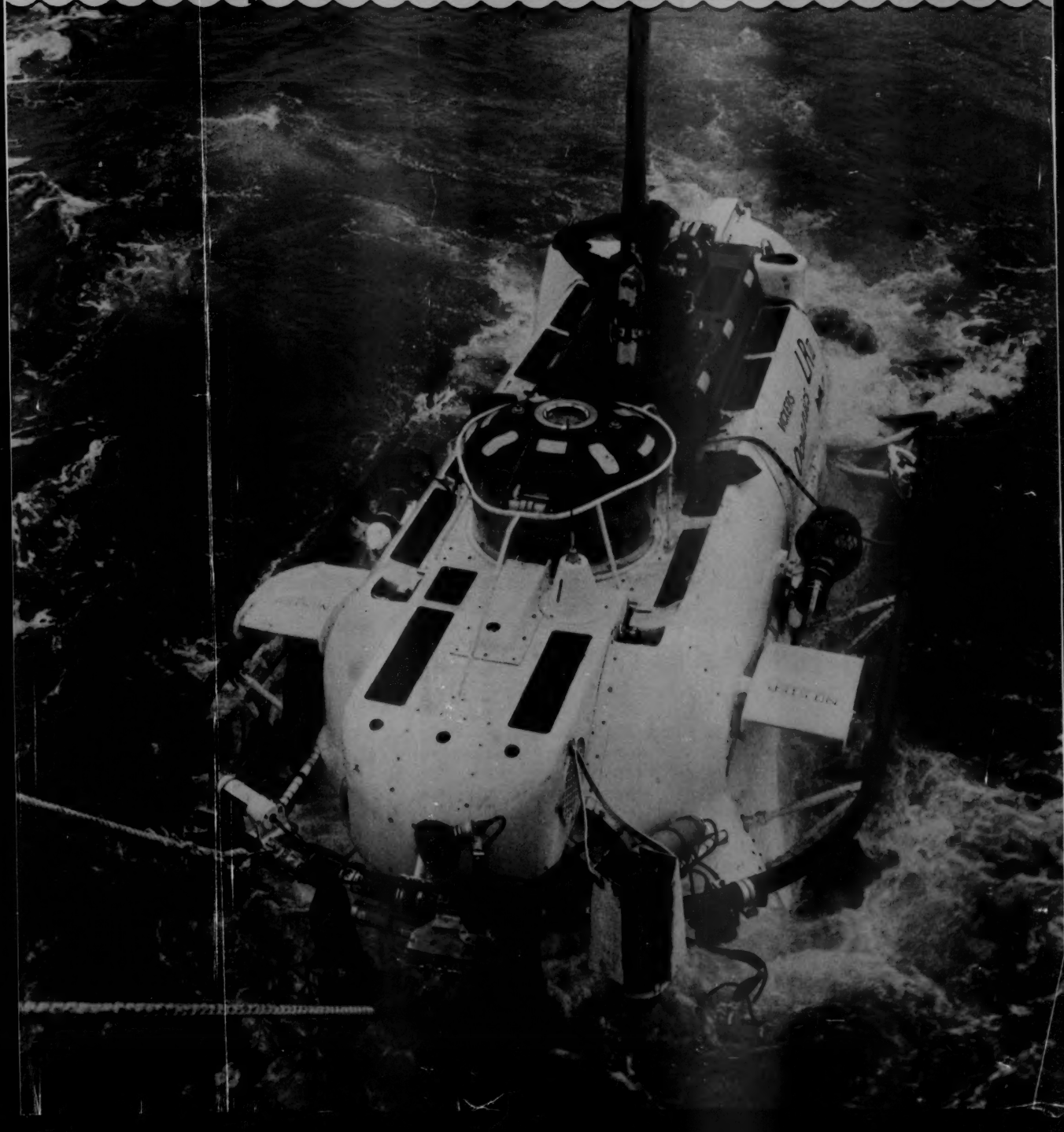
Trade and Industry

27 May 1977 35p

Britain at Houston offshore technology conference
Shipshape at the National Maritime Institute
World's first plastics submersible: the Vickers LR2



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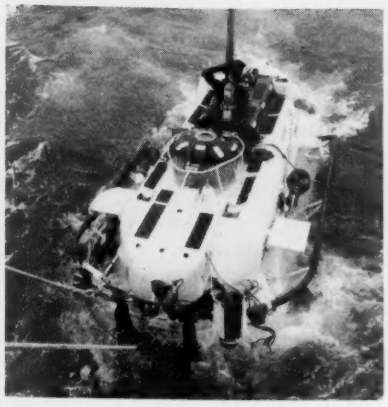
Trade and Industry

27 May 1977

News from the Departments of Industry·Trade·Prices & Consumer Protection



We're all at sea this week. Our cover picture shows the first plastics submersible in the world – the Vickers LR2 – pictured in the North Sea where it has recently completed extensive trials, while our technology feature looks at the work of the National Maritime Institute (page 388).

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Trade and Industry this week

HOME

Education needs of small business

In association with the Department of Education and Science and the Training Services Agency, the Department of Industry has commissioned the Manchester Business School to undertake research into the management and business education needs of the manufacturing sector of the small business community. This was announced by Eric Varley, Secretary of State for Industry, in answer to a Commons question on 25 May.

The study will concentrate, in particular, on an examination of the needs and current provision in respect of certain industries in which production by small firms represents a substantial proportion of the industry's net output. The research is expected to take about a year to complete and the possibility of conducting similar studies into the management and business education needs of other sectors of the small business community will be considered in the light of the conclusions reached on manufacturing.

It is hoped that the study will provide, in regard to manufacturing, a basis for considering improved ways of meeting the management and business education needs of small businesses and the extent to which existing resources might be more effectively utilised.

UK initiative on marine safety

Britain has proposed the establishment of a marine safety corps to tackle the problem of sub-standard ships, especially tankers, Stanley Clinton Davis, Parliamentary Under-Secretary of State for Companies, Aviation and Shipping, told the Council of IMCO, the UN inter-governmental maritime consultative organisation, in London on Monday.

The safety corps would consist of marine surveyors who would be drawn from countries with experienced marine administrations and good safety records and they would assist in improving the performance of those flag states with poor safety records – and the evidence was overwhelming that these were mainly flags of convenience, he said – and less adequate marine administrations.

Mr Clinton Davis added, 'I hope that this imaginative concept can be seen as complementary to some of the US proposals. It seems to me to be right that our main thrust should be concentrated in this way on the relatively small, but too significant, proportion of tankers which are sub-standard.'

He then welcomed the proposals put before IMCO by Brock Adams, United States Secretary for Transportation. 'I believe,' said Mr Clinton Davis, 'that the United States' initiative to bring the problems of tanker safety to IMCO is entirely constructive in concept.'

Responding to the assurance Mr Adams had given that the United States fully intended negotiating an international solution to the oil tanker problem, Mr Clinton Davis said the UK intended doing so too; and it would bring to bear the full range of its technical experience in this field.

Submarine pipeline inspection

Under new regulations, announced this week, government inspectors will be able to require a submarine pipeline to be shut down to avoid the risk of an accident or pollution. The regulations were laid before the House of Commons under the Petroleum and Submarine Pipelines act 1975. They set out the powers and duties of inspectors appointed under the 1975 act, in relation to submarine pipelines with initial or terminal points in the United Kingdom or on the UK continental shelf and to activities related to the construction, operation and maintenance of pipelines. Under the regulations an inspector may inspect a pipeline; obtain access to premises, vessels and installations used in connection with pipeline operations; inspect and test equipment; take measurements and photographs; inspect records and documents; and require the pipeline owner to convey him to and from any vessel engaged in pipeline activities. He may also require the pipeline to be shut down when he considers it necessary to avoid an accident causing either serious injury to a person or pollution from a pipeline. The regulations also require pipeline owners to report accidents to persons engaged in pipeline activities and certain other occurrences which could endanger the safety of those engaged in pipeline activities or the safety of a pipeline itself.

Dell to study commercial practices

Following the Prime Minister's request to the Secretary of State for Trade to study commercial practices of British companies, the department is urgently examining two main areas.

First, what the position of the British government should be pending a general world agreement on the subject of commission payments; and second, what can be done to bring international agreement closer, both through the International Chamber of Commerce, which is a non-governmental attempt to reach agreement on the subject, and through parallel discussions between governments in the United Nations this summer.

Welding R and D contract placed

A 12-project R and D programme on all aspects of welding is to be carried out by the Welding Institute under a contract placed by the Department of Industry's Engineering Materials Requirements Board. The contract will total £1.9 million and is to be spread over three years. It recognises the key role of welding in production and in the safe operation of engineering structures.

This sum is part of nearly £6 million which the board is allocating this year for industrial research and development on engineering materials. These include ferrous, non-ferrous, organic, inorganic and composite materials, and their processing for engineering, and domestic, use.

One of the 12 projects which the institute will carry out will be an investigation into magnetic impelled arc welding, a new technique. Another is to improve brittle fracture risk assessment. To reduce the number of unsatisfactory welds, the influence of operator variables will be studied. Attempts to find ways of characterising fluxes from their

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physical properties will be made. Work which the institute will carry out under the programme will also include welding of non-ferrous metals to up-date current knowledge. The institute also proposes to examine various known, but little-used, techniques for improving productivity in arc welding.

Test case for industrial strategy

The domestic electrical appliance industry is going to provide an important test case in evaluating the future success of the industrial strategy, Bob Cryer, Parliamentary Under-Secretary of State, Department of industry, said at the opening of the international domestic appliance trade fair in Birmingham on 24 May.

'The industry has been chosen by the government as a priority sector under the industrial strategy,' Mr Cryer went on 'It is obviously of major importance both for the industry itself and for the credibility of the industrial strategy that the joint work now going on to assist with product development, to encourage investment, and to promote exports, should make a real impact over the next few years.'

The problems of the industry in facing the fierce competition from overseas were, by their nature, more under the public eye than most. There was inescapable evidence of foreign electric washing machines, freezers and shavers down almost every high street, Mr Cryer added. In the last year, however, the balance of trade in domestic electrical appliances had improved.

Film committee invites evidence

On 24 May it was announced that the interim action committee on the film industry is inviting evidence from interested parties on any matters coming within its terms of reference.

Written submissions should reach the secretary to the committee by 31 August.

Letters inviting evidence have been sent direct to film industry trade associations and unions. The text of the letter is now being published to give others an opportunity to contribute.

This committee held its first meeting on 11 May, under the chairmanship of Sir Harold Wilson. The committee agreed on an immediate programme of work reflecting the terms of reference set out in the Secretary of State for Trade's announcement of 22 July 1976 with the aim of achieving a viable and prosperous British film industry over the next decade.

Centre of Britain

A special report on the Yorkshire and Humberside region will be published in *Trade and Industry* on 24 June.

OVERSEAS

Dell visits Moscow

Secretary of State for Trade, Edmund Dell, is visiting the Soviet Union this week (23 to 30 May).

He is leading the British delegation to the sixth meeting of the United Kingdom-Soviet inter-governmental commission for co-operation in applied science, technology, trade and economic relations, which opened in Moscow on 24 May. Mr Dell is also calling on individual Soviet leaders and ministers.

The British delegation includes Alan Williams, Minister of State at the Department of Industry; Sir Howard Smith, ambassador to the USSR; Mr G. A. Lee, director, BP Trading Ltd; and Sir Cyril Pitts, special representative of the CBI and general manager, International Co-ordination, ICI; as well as senior officials of the Department of Trade and the Foreign and Commonwealth Office.

The Soviet delegation to the joint commission is led by academician Mr V. A. Kirillin, Deputy Premier and Chairman of the State Committee for Science and Technology, and includes the First Deputy Minister of Foreign Trade.

The joint commission, which is reviewing trade and economic, industrial, scientific and technological co-operation and considering future prospects, met previously in London from 11 to 13 May last year. The terms of reference call for meetings to be held once each year, alternately in London and Moscow.

CDC's year of achievement

Commitments made in 1976 by the Commonwealth Development Corporation were £38.03 million, of which 79 per cent were placed in the poorer countries and 71 per cent in renewable natural resources. They were spread over 24 projects in Africa, the West Indies, and the Pacific. It was a year of solid achievement, according to the annual report of the corporation, published on Tuesday. Many of the 250 or so on-going projects invested in by the corporation are in the initial development stage or are still expanding.

The corporation invests in the development of resources, material and human, choosing its projects principally for their development value to the country concerned. Its projects are required to operate on business lines, so as to provide a reasonable rate of return on the money invested. Gross revenues in 1976 were £24.84 million, with an operating surplus of £20.37 million.

Its activities have created much-needed employment opportunities, many of which were in the field of labour-intensive agricultural development. Efforts to find new business have been stepped-up. Agriculturists based on the London headquarters were concerned in 26 major project investigations in 14 different countries. In the industrial sector there was a large increase in manufacturing capacities in a wide range of projects. Corporation loans were supporting the expansion of electricity generating capacity and water supplies in several developing countries. Many thousands of modestly priced houses were built around the world with the assistance of the corporation.

Unlosc opens

The United Nations conference on the law of the sea (Unlosc) opened in New York this week (23 May).

One of the major issues under discussion is the establishment of agreed rules for exploiting mineral resources on the deep-sea bed.

The second area of the conference's work covers economic zones and will also deal with marine pollution and research.

This will be the sixth eight-week session since the current round of negotiations started in Caracas in 1973.

ECGD guarantees two loans

This week the Export Credits Guarantee Department announced backing for two loans – one to Poland and the other to Qatar. The £13.2 million loan to Bank Handlowy w Warszawie SA, Poland, arranged by Kleinwort Benson acting on behalf of Lloyds Bank Ltd, will help finance a £24.6 million contract awarded by Intraco, the Polish foreign trade enterprise, to Cementation International for the supply, erection and equipping of two 320-bedroom hotels in Gdynia. The whole of the finance for this contract has been arranged by Kleinwort Benson.

The second, a further line of credit of £4.4 million to the Qatar Fertiliser Co (SAQ), arranged by Hambros Bank acting on behalf of syndicate of London and Scottish clearing banks will help finance equipment and services for an extension of the ammonia and urea plant at the Umm Said industrial complex located 30 miles south of Doha, the capital of Qatar.

For other ECGD news, see page 395.

EUROPE

Agriculture meeting

EEC agriculture ministers were in the UK this week as guests of John Silkin, Minister of Agriculture, Fisheries and Food, in his capacity as president of this council.

The informal visit began on Tuesday with a meeting at Lancaster House. The ministers then travelled to Cambridgeshire to see the work of the Plant Breeding Institute at Trumpington. Later the same day they toured a pig enterprise in Royston, Herts.

Home news

A future for the footwear industry: steering group reports

Some 55 wide-ranging recommendations and a request for £11,305,000 in government financial assistance are contained in a report presented to Eric Varley, the Secretary of State for Industry, on 24 May by the Footwear Study Steering Group. The steering group's report, which is under consideration by the Department of Industry, covers the size and structure of the industry, recent trends in its performance and an analysis of its needs and problems.

During the past three years the footwear industry has been suffering its worst recession since the 1930s following a decade during which the post-war growth in demand had already largely come to an end. Between the two cyclical peaks in demand which occurred in 1964 and 1973 total pairage supplied to the home market, including imports, rose only by 4 per cent, or some ½ per cent per year. Sales of complete footwear of its own production by the UK footwear manufacturing industry in 1976 came to £473 million or 157 million pairs. Consumption amounted to about 236 million pairs of which 97 million were imported.

Compounding the problems of static or falling demand, has been a steady growth in imports. The share of home pairage consumption held by imports rose from significant levels in the early 1950s to reach 42 per cent in 1976. Exports as a proportion of output, on the other hand, have only risen from around 8 per cent to 11-12 per cent over the whole post-war period.

The industry directly employs about 74,000, and a further 25,000 or so are estimated to be indirectly dependent upon it. Most of these are employed outside the assisted areas and there is an important concentration of employment in the East Midlands. The largest five producers of footwear in the UK account for about one-third of the industry's total sales, with the remainder accounted for by some 250 firms employing 25 or more workers and a large number employing less than this number. Thus despite an increase in concentration over the last decade there are few really large enterprises. This reflects the relative absence of economies of scale in production, which in general cease to be significant in a factory of more than about 250 workers.

To ensure the footwear industry's future viability, the report recommends action. In general terms, it seeks to encourage the role of entrepreneurs in the industry; the formation of new export marketing companies; appointment of senior executives and marketing managers; formation of freelance design groups; and to give added emphasis to design training. There are also recommendations for a scheme for the audit of manufacturers' operations and subsequent implementation of consultants' recommendations and for investment in closing room equipment. The report deals at length with problems caused by imports and also seeks to encourage the industry to give far more attention to exporting and a target of doubling exports in three years is proposed. Lastly there is a recommendation that there should be a successor body to the steering group to monitor the implementation of recommendations and provide focus for discussion and examination of matters of interest to the industry as they arise.

An invitation to take part in an examination of the industry's future was made to the footwear manufacturing industry in January 1975 by Michael Meacher, then Parliamentary Under-Secretary of State for Industry. The study steering group was set up with footwear manufacturers, unions, government officials and four MP's participating, and with the following terms of reference:

> 'To consider ways of improving the efficiency and international competitiveness of the UK footwear manufacturing industry, and of ensuring its viability, and to make recommendations.'

The steering group was aided by working groups studying certain areas in detail. The home market group examined the industry's supply systems, design, fashion, service and distribution, including close contacts with footwear distributors. The exports group covered all aspects of overseas marketing and associated topics. Independent consultants, the Economists Advisory Group, were commissioned by the Department of Industry to carry out studies for both these groups. A third working group examined the efficiency and technological development of the industry and was aided by studies carried out by the Shoe and Allied Trades Research Association and commissioned by the Department of Industry. Another group examined the short-term problems caused by imports.

The report will be published in due course and will be available from the Department of Industry's Central Library.

Three bottling machines in one

Morgan Fairest Ltd's 'Monobottler' has created immense interest amongs, and attracted immediate firm orders from, major companies throughout the bottling industries. Built as a single unit on a base size about half that of the machines which it replaces, the Monobottler performs the processes of three individual machines, but in one cohesive totally synchronised, conveyorless operation. The constant level of bottle control in itself is something new, since with a complete absence of conveyors, all bottle-to-bottle contact is removed and the consequent reduction in noise level represents a great step forward in improving bottling hall work conditions and makes compliance with the latest safety regulations much easier. Cleaning, filling and capping are synchronised in one unit at speeds up to 250 bottles per minute.

Invisible earnings prospects

Net overseas earnings, gross invisible earnings minus gross invisible payments, of the major UK service industries should grow by around 25 per cent in 1977 on 1976. The larger part of this estimate, given in the sixth annual survey of the Committee on Invisible Exports, is based on expectations of world economic expansion resulting in growth in the volume of business. Price rises and the low value of the pound are also significant factors. The service industries account for over 60 per cent of the UK's invisible earnings.

The greatest rise in invisible earnings is predicted in the field of British construction work overseas. The Association of Consulting Engineers and the Export Group for the Constructional Industries both predict substantial increases, the former due to a higher share in the growing volume of business and to price factors, the latter due almost entirely to increased volume.

Other sharp increases in overseas earnings are expected from inward tourism and by the major UK airlines. It is in these sectors that the relative cheapness of sterling has played a major part, both in encouraging visitors to the UK and in increasing the value of sales of airline tickets where prices are fixed internationally. Increased earnings from tourism are expected to stem mainly from Europe, north America, Japan, Australasia and the Opec countries, from where the numbers of business and holiday visitors are expected to grow rapidly.

Prospects for overseas earnings also look bright for the insurance brokers and insurance companies and in the banking sector, particularly for the clearing banks. A rise of between 5 per cent and 10 per cent in international trade is expected to contribute to an increase of up to 15 per cent in earnings of the shipping industry and stock exchange earnings should rise because of a marked increase in the volume of world share trading despite the decline of London as a centre for gold share dealings.

The export houses expect to achieve an increase of between 8 per cent and 11 per cent in overseas earnings although, in common with many commodity traders, they fear some adverse effects from the recent exchange control restrictions on the use of sterling to finance third-country trade.

For commodities as a whole prospects are mixed, but some soft commodity brokers are predicting a substantial rise in net overseas earnings this year following recent price increases. Because of conditions in the freight market the Baltic Exchange does not expect any growth in earnings and mentions the possibility of a slight decrease.

The major growth areas for invisible earnings in 1977 are seen as the Opec countries (due mainly to increased wealth and industrialisation), north America (where some reflation of the US economy is expected), other EEC countries, Asia and Australasia.

High rates of UK taxation, says the committee, stand out as some of the most widely-felt contraints on invisible earnings, both as a disincentive to the expansion of overseas business and a stumbling block in the fight to retain key personnel. Other factors include the rate of inflation in the UK, high interest rates, the depreciation of sterling, exchange control measures related to the financing of third-country trade, the threat of nationalisation in the banking and insurance sectors and political instability in certain parts of the world.

Rates of growth forecast in the committee's surveys cannot be directly equated with rates of inflation, as price changes for invisibles may bear little relation to changes in the retail price index. 'Price' can, in some cases, be simply the margin between banks' borrowing and lending rates or, for insurers, between premium income and claims met.

Net private invisibles have in recent years grown as follows: 1974, £3,034 million; 1975, £3,072 million; and 1976, £4,364 million. The 1976 figure of £4,364 million represents an increase of over 24 per cent over 1975.

Product development: 100 applications received

Pointing out that product development was a key element in the industrial strategy programme, Leslie Huckfield, Parliamentary Under-Secretary of State, Department of Industry, said on 20 May that the department had so far received some 100 applications of assistance for product development projects costing nearly £54 million.

Speaking at a seminar on industrial policy organised by the Transport and General Workers' Union under the Ernest Bevin International Study Group Scheme in Eastbourne, Mr Huckfield emphasised the need for both new products and increased investment if British manufacturing industry was to be competitive in changing world market conditions. Since April 1975, he said, government schemes had attracted applications for investment projects worth nearly £1,800 million.

The government was reviewing the range of existing assistance for research and development, Mr Huckfield continued, with the aim of developing this into a more effective framework of measures clearly focused on support for new product design and development in the sectors covered by the industrial strategy work. Financial assistance for product development was a significant feature in a number of the sectoral industry schemes which the government had introduced under the 1972 Industry Act.

Mr Huckfield explained that support for product development was currently available in four sectors – machine tools, textile and printing machinery and electronic components. So far approximately 100 applications with a product development orientation had been submitted by firms in these sectors, and assistance of about £13 million towards projects costing almost £54 million had been approved or was under consideration.

In total under the 11 sectoral industry schemes, assistance for over 1,200 projects had been approved or was under consideration, involving an estimated project cost of £813 million, Mr Huckfield said. And under the new selective investment scheme assistance for 66 projects with an estimated cost of £325 million was under consideration. With the earlier accelerated projects scheme – which involved investment projects totalling £640 million – this meant that so far under the various government schemes introduced since April 1975 assistance had been sought for investment projects totalling nearly £1,800 million.

Hand tool exports improve

The balance of external trade in hand tools has improved over the years, particularly during 1974 and 1975, with 1975 showing a peak balance of £24 million in favour of exports. While exports have increased, so too have imports which, in 1975, reached 36 per cent of total sales of hand tools in the home market, with West Germany, Sweden, Japan and the USA being the main suppliers. This is evident from a statistical report on the industry covering the years from 1966 to 1975 published by the Federation of British Hand Tool Manufacturers.

As might be expected, the report finds that the industry has been subject to the usual cyclical pattern of upturns and downturns that has bedevilled British industry over the past 20 years, though it has suffered less than most due to an excellent export performance. There has been some increase in production in real terms over the period, with total sales standing at £120 million in 1975. But with other countries expanding more rapidly, the United Kingdom has dropped to fifth place in the world league behind the USA, West Germany, Japan and France. Even though production has only risen slightly over the period, exports have risen from 33 per cent in 1966 to 44 per cent by 1975. The customers have changed little, with the 'old Commonwealth' countries and USA continuing to head the list. There is little evidence of a serious increase in sales to EEC countries, though it is interesting to note that of the European countries, the United Kingdom is the second major exporter to EEC, with West Germany well in the lead.

Over the 10-year period the numbers employed in the industry have declined by 17 per cent so that it can be said that, in terms of real output compared to numbers employed, efficiency has increased by 24 per cent over the period.

The report concludes that, like most British industries, the hand tool industry has not increased production over the past 10 years sufficient to retain its share of expanding world markets. It is struggling to prevent importers from taking an increasingly large share of the home market, particularly in the case of files and rasps and wrenches and spanners. Although not reflected in this report it is known that anti-dumping applications have been made on behalf of the industry to the government in respect of both these classes of tools. The industry remains a major net exporter of tools and is, therefore, an important part of the nation's economy. Efficiency has increased

over the period of the report, no doubt following the formation or strengthening of the five major groups in the industry. It will be interesting to see, says the report, if increased efficiency, allied to the undoubted quality of British tools, can withstand the increasing hand tool production and cheap exports from a number of countries employing cheap labour, particularly in parts of the Far East.

A STATISTICAL REPORT OF THE UNITED KINGDOM HAND TOOL INDUSTRY FROM 1966-75 is available, price £25, from the Federation of British Hand Tool Manufacturers, Light Trades House, Melbourne Avenue, Sheffield S10 2QJ.

Eddison Plant Ltd

The Price Commission has revoked the notice issued on 30 October 1975 under section 6(2) and (3) of the Counter-Inflation Act 1973 to Eddison Plant Ltd of Harlaxton Road, Grantham, Lincolnshire, requiring the company to restrict charges for the hire of construction plant and materials handling equipment. The notice issued in October 1975 required Eddison Plant to reduce charges by an average of 6 per cent to eliminate excess profits of £293,500 made in 1974. As this excess has now been eliminated, the notice is no longer required and has therefore been revoked.

Clearance of merger proposals

Secretary of State for Prices and Consumer Protection, Roy Hattersley, has decided, on the information at present before him, not to refer the following proposed mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

European Ferries Ltd and English and Caledonian Investment Co Ltd
Coral Leisure Group Ltd and Centre Hotels (Cranston) Ltd
Vokeworth Securities Ltd and Tremletts Holdings Ltd.

British Airways' appeal dismissed

Edmund Dell, Secretary of State for Trade, has dismissed an appeal by British Airways against the Civil Aviation Authority's decision to grant British Air Ferries a licence to operate a scheduled service on the route Manchester-Rotterdam and/or Antwerp.

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842. (Alternative no 01-215 5051.)

Steady investment forecast in process industries

Total capital expenditure by the process industries in the United Kingdom is forecast to amount to £12,300 million (late 1976 prices) in the three years to 1979, and expenditure on process plant is forecast at £4,600 million. Based on the investment plans of the UK process industries, a forecast of investment in process plant is to be published in the summer by the National Economic Development Office's process plant working party. The working party, which is shortly to become a full economic development committee, has released a summary of its main report.

The forecasts suggest that there will be slightly greater expenditure on process plant in 1977 and 1978 than was predicted last year; and they indicate fairly steady spending in the period to 1979 at a level similar to that of 1975-76.

Against this central prediction of stable expenditure by the process industries as a whole it should be noted that: the trends vary markedly between the customer industries; the degree of confidence that can be placed in the forecasts also varies between sectors; and suppliers report some slowness in translating the higher investment intentions in the chemicals and food and drink sectors into orders, though there have been plenty of inquiries.

Investment in the chemical industry did not achieve previously forecast levels for 1976, but a 17 per cent increase is predicted for 1977, and further growth to 1979. There is general confidence that there will be an increase in chemical industry investment this year, though a Department of Industry survey has suggested the rate may be lower; conversely the total investment programme for chemicals may be higher than forecast towards the end of the period if a number of large projects, which are currently somewhat uncertain, actually go ahead, and if the UK is successful in attracting inward investment from abroad. The current forecast probably contains more petrochemical investment than previously, reflecting the increasing importance of downstream oil-related activity.

The number of orders for fixed deep-water oil and gas production platforms by 1981 is forecast to lie in the range six to 14. In addition there will be orders for floating and semi-submersible systems and a number of light

TOTAL CAPITAL EXPENDITURE BY THE PROCESS INDUSTRIES AT CURRENT AND LATE 1976 PRICES
£ million

	Actual		Forecast (late 1976 prices)					
	1975	1976	1977	1978	1979	1980	1981	Notes
Chemicals	584	680	798	871	887	n.a.	n.a.	1, 7
Oil and gas production	1,463	1,740	1,500	1,300	1,050	800	n.a.	7
Petroleum refining and distribution	159	160	196	312	300	n.a.	n.a.	7
Gas supply	288	261	227	225	286	339	313	3, 6, 7
Steel	452	622	637	663	812	801	755	4, 6, 7
Electricity generation	411	504	505	404	330	314	560	3, 6, 7
Food and drink	190	197	328	344	300	n.a.	n.a.	5, 7
Total	3,547	4,164	4,191	4,119	3,965	n.a.	n.a.	

EXPENDITURE ON PROCESS PLANT AT CONSTANT (1970) PRICES
£ million

	Actual					Forecast					
	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	Notes
Chemicals	119	97	109	125	130	152	166	169	n.a.	n.a.	1, 7
Oil and gas production	14	33	107	184	186	155	134	108	83	n.a.	2, 7
Petroleum refining and distribution	30	40	27	29	23	29	47	44	n.a.	n.a.	7
Gas supply	30	32	54	60	46	37	35	47	59	55	3, 6, 7
Steel	34	32	40	51	51	49	51	62	62	58	4, 6, 7
Electricity generation	47	56	62	66	69	66	52	43	45	73	3, 6, 7
Food and drink	27	50	76	59	54	89	88	72	n.a.	n.a.	5, 7
Total	301	340	475	574	559	577	573	545	n.a.	n.a.	

n.a. = not available.

Notes to summary tables:

1 Figures for chemicals relate to CIA members. At least one project being undertaken by a non-member has not been included.
2 Process plant estimates for oil and gas production assume a constant 25 per cent of total expenditure and therefore do not take account of the changing mix of expenditure from year to year.
3 Figures for gas and for electricity generation are not strictly comparable with previous forecasts due to a change in the calculation from financial to calendar years. Figures for 1972-74 are still on a financial year basis.
4 Figures for steel relate only to BSC expenditure. Private sector investment is expected to be similar in 1977 to 1976, and about 20 per cent of the BSC total; however forecasts are not available beyond 1977.
5 Figures for the food and drink industry cover only part of that industry and have not been grossed up.
6 Nationalised industry figures do not correspond precisely to those issued by the Treasury as:
  a they are for calendar rather than financial years,
  b they cover expenditure on capital equipment rather than total capital requirements,
  c there may be different base dates for the money values.
7 Some of the industry forecasts are subject to a considerable margin of uncertainty, as discussed in the text for each sector.

platforms for shallow water. Although there could be some bunching of orders in 1977 and 1978 these are not expected to be sufficient to offset all the fall-off in work on earlier orders.

The prospects for oil refinery investment are now much brighter than they appeared last year because of a number of projects for crackers and other items planned for existing sites. Even if none of the possible new refineries under consideration (Cromarty, Occidental, United Refineries and Burmah/Total) is started in the forecast period, annual expenditure in 1977-79 will be significantly higher than in 1976. The figures in the summary tables do in fact assume that one new refinery will be started in the near future; it could be two but the probability of that must be low with existing overcapacity in refining.

The British Gas Corporation's expenditure is forecast to amount to £746 million over the next three years; it will dip in 1977 and 1978 but is expected to increase thereafter. The bulk of the present and future expenditure continues to be on the development of the national transmission system.

The British Steel Corporation's investment programme appears to be rather lower in real terms than previously forecast. Total expenditure will amount to £2,112 million over the three years to 1979. The programme envisages the start in 1977 of 65 major new projects of over £2 million and 18 projects of over £10 million in value. The principal project to be put in train is the Port Talbot scheme, which will require total investment of £835 million over more than five years. The private sector steel-makers are planning to invest some £100 million in 1977.

Expenditure by the four electricity boards is expected to be £1,239 million over the next three years, which is somewhat lower than previously forecast, and shows a large fall between 1977 and 1979. Nothing can now avert the immediate downturn but the process plant industry expects that decisions will be taken on Drax B and orders for fossil-fired stations generally, and on the choice of nuclear system, so that orders can be placed as early as is practicable. Until these decisions are made no forecast from 1979 onwards can be regarded with any confidence.

Forecasts of expenditure on food and drink processing are substantially higher than those made in 1976, totalling nearly £1,000 million for the companies in the survey over the three years to 1979. Brewing investment, which accounts for around one-third of the total, is expected to be extremely buoyant over the period, largely reflecting the need for extra lager brewing capacity to meet the increased demand for lager. Food investment too is expected to increase in 1977 for various reasons, including improved expectations of home and export demand.

A number of process engineering contractors have provided forecasts of the new business they hope to secure in 1977 compared with the two previous years. It is expected that the value of new contracts obtained in the UK will be much higher than in 1976 but that there will be a marked fall in new business overseas. The value of hardware orders for overseas contracts will be correspondingly lower in 1977 but the contractors expect to place a higher proportion in this country, thus maintaining their level of purchasing in the UK.

Rail investment to be maintained – Callaghan

'We need to plan to create the conditions for fair competition in transport,' said the Prime Minister in a speech to the Transport and Salaried Staffs Association conference in Great Yarmouth on 18 May. He referred, for example, to the recent increase on taxes on heavy lorries which was meant to create conditions in which they did not have an unfair advantage over railways.

It was necessary to continue with this process of making competition more equal, so that each mode of transport could plan its development in the light of what it could do best, Mr Callaghan added.

There were, he said, areas in which the railways could hold their own with anyone. No other system could compete with railways in the efficient movement of bulk freight, from one part of the country to another. Maximum efficiency was needed here to assist the success of the government's strategy on which this country's future industrial prosperity depended.

If railways were to do their job they must invest, to replace and improve their equipment, Mr Callaghan continued. The government understood that need and believed it had done a good job in protecting the flow of funds for this purpose. Despite the financial background, rail investment had not been cut, nor did the government plan that it should be. The immediate aim was to keep new investment at present levels for the next four years. That would mean the completion of the Bedford/St Pancras scheme, new rolling stock for southern region, approved last month, new high-speed services to the west of England as a counterpart to the highly successful service to south Wales and more air-braked wagons for freight.

For the future, Mr Callaghan said he wanted to see an agreed programme of investment giving the industry a stable basis on which to plan ahead. That way, the available money could be used to best advantage.

But he pointed out that however efficient it might be, no railway in Europe could operate at fares the public were prepared to pay without financial support. Subsidies had grown very fast in recent years – from £133 million in 1971-72 to £507 million in 1975-76. If productivity increased less than it could, fares, or subsidies, or both would have to go up.

The government would maintain the level of investment in the railways to give them the greatest possible chance of meeting competition and fulfilling their obligations, Mr Callaghan said. It would also see that the railways got very substantial subvention to passenger services to meet those costs that could not otherwise be met. At the end of the day, however, the more achieved in terms of increased productivity, the less would be the need to increase fares or subsidies.

British Rail meets objectives

An operating surplus before interest of £13.7 million is reported in British Rail's annual report and accounts for 1976. Compared with a loss in 1975 of £28.3 million, this gives an improvement of £42 million. Despite inflation and the continuing recession, British Rail beat the cash limits set in advance for public service obligation payments, which amount to an annual contract between British Rail and the government for the provision of passenger services. The 1976 contract price of £358 million was undercut by £39 million. In addition, the short-term grant for losses on freight and parcels operations was contained

Hovercraft delivered

SRN4 MKII Hovercraft built by the British Hovercraft Corporation for Hoverlloyd was delivered to Ramsgate last week. The 160-mile journey from Cowes to Ramsgate was completed against force six to seven winds at an average speed of 55 knots. It is expected that the new cross-channel craft will go into service in mid-June.

within the £60 million limit by a margin of £25 million.

More freight was carried than in 1975 with an increase in gross revenue of £62 million. The downward trend in passenger volume was reversed from April onwards with the business earning £505 million over the year, an increase of about 2 per cent in real terms. Manpower was reduced by 8,151, a cut of 3 per cent. At the end of the year, British Rail was operating with 171 fewer locomotives, 670 fewer passenger vehicles and 29,000 fewer freight vehicles. All British Rail's subsidiaries made progress, with a higher surplus from property, hotels and harbours. Shipping losses were halved and hovercraft services broke even.

Jobs for young people

Proposals for a unified programme of employment opportunities for young people have been approved by the Manpower Services Commission. The new programme, which it is intended to fully implement in September 1978, would replace the current temporary measures. The proposals are contained in a report of a commission working party published last week. They are being discussed with the government.

The report suggests that the problem of youth unemployment is too urgent to allow time for experimenting with entirely new concepts and approaches. The proposals for a new programme have been developed within the framework of present schemes to help unemployed young people. These schemes have been tried and have proved successful and attractive to young people themselves.

The new programme offers a total of nearly 130,000 places providing for a total of 234,000 opportunities each year for young people. It is recommended that all young people in the programme should be paid a standard flat-rate allowance of £18 per week. The cost is estimated to be £168 million a year. Allowing for offsetting savings in supplementary benefit and unemployment benefit and the other costs of unemployment to society, the net cost of the new programme is estimated to be in the region of £95 million.

The opportunities provided in the new programme consist of courses designed to prepare young people for work and four kinds of work experience. Two-week assessment or employment induction courses, short industrial courses and remedial or preparatory courses would be provided. The work experience would be on employers' premises, project based, in training workshops or through community service. All the forms of work experience would provide opportunities for young people to participate in off-the-job training or associated further education.

The new programme has been designed to encourage young people to take a suitable permanent job at the earliest possible moment. The report emphasises the need to provide opportunities for young people which improve their prospects of finding and retaining permanent employment.

Unemployed young people were not different from other young people, the report says. Success or failure in getting a job was often a matter of luck and frequently determined by matters such as the state of the national economy, the local industrial structure or the kind of preparation for work available at school. The programme is, therefore, seen as a part of other programmes for young people and of wider manpower policies.

The programme, the working party concludes, should not attempt to provide every unemployed young person with an opportunity. Such an objective, even if it were feasible, would be unnecessary, since many young people are unemployed for only a very short period. Moreover, it could damage the employment prospects of young people by removing them from the labour market at a time when many might have obtained employment. This would involve an unacceptable degree of interference with the normal working of the labour market. The scale of the proposed programme has, therefore, been related to a yard-stick of likely demand and an assessment of the range and number of opportunities it might be feasible to supply.

Patents endorsed 'licences of right'

Under section 35 of the Patents Act 1949, the following patents were endorsed 'licences of right' on the dates specified.

12 May 1977

1383549 The Post Office
Improvements in or relating to optical communications systems
1383550 The Post Office
Improvements in or relating to optical communications systems
1395495 The Post Office
Telephone conference amplifier
1306923 Alan Salisbury Lamburn
Drive coupling
1402706 Alan Salisbury Lamburn
Improvements in or relating to torque transmitting couplings
1185697 Societe Anonyme Automobiles Citroen
Improvements in hydraulic machines with adjustable valve timing adapted to operate as pumps or motors
1188002 Societe Anonyme Automobiles Citroen
Improvements in variable displacement hydraulic motors operable as pumps
1324522 AAI Corporation
Improvements in and relating to cartridges with improved primers
1325819 Robert Bosch GmbH
Improved worm gear
1412664 Gebruder Welger
Agricultural balers
1450139 Autombiles Peugeot and Regie Nationale des Usines Renault
Improvements in or relating to a locking device, in particular for a safety belt

18 May 1977

1296370 Etat Francais represente par Le Ministere d'Etat charge de La Defense Nationale, Delegation Ministerielle pour l'Armement (Direction Des Poudres)
Processes for the preparation of para-nitro-so-and-nitrophenols
1331311 Etat Francais represente par Le Ministere d'Etat charge de La Defense Nationale, Delegation Ministerielle pour l'Armement (Direction Des Poudres)
Improvements in or relating to the preparation of dry nitrocellulose granules
1134245 Hepworth and Grandage Ltd
Improvements in or relating to the control of thermal expansion of generally circular cross-section bodies
1202018 Hans Cramer and Karl Cramer
Potato planter
1381022 William Bruce Gauntlett
Improvements in or relating to animal-restraining devices
1426341 Agfa-Gevaert Aktiengesellschaft
A process for the production of an image on a support
1432408 Jean Ernest Dutry and Alfred Hubert Feyens
Internal combustion piston engine
1456211 Deritend Engineering Co Ltd
Lidding apparatus
1457641 Worthington-Simpson Ltd
Improvements relating to tanker ship cargo pumping systems

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patents form 45 within two months after the date of endorsement. E. Armitage, Comptroller

'Licences of right': endorsement cancelled

Any person may give notice of opposition to the undermentioned application for cancellation of endorsement 'licences of right' under section 36 of the Patents Act 1949 by filing patents form 46 within one month from the date of this magazine.

1252805 Bostik Ltd
Improvements in or relating to polymeric compositions

Government sales

Ministry of Defence

Sale by auction

15 June 1977—Miscellaneous stores

Location
The Bristol Esso Hotel, Filton Road, Hambrook, Bristol

Auctioneers
Russell Baldwin and Bright (Dept L), 19/21 King Street, Hereford HR4 9DB (tel. 0432 55441)

Stores lying at Hereford, Aston Down and other depots including vehicles, machine tools, jacks, tyres, jerricans, aircraft-MT-electronic and electrical spares, bunk beds and other furniture, carpets, blankets and other clothing and textiles, and a large collection of other miscellaneous stores.

Catalogues which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 20p postage and packing 10p extra (postal orders only).

Carriage of Post Office surface mail to USA and Canada.

The Post Office is inviting tenders for the carriage of surface mail in containers from the United Kingdom to USA and Canada for a period of one year from 1 September 1977.

Forms of tender, which must be returned by 27 June 1977 can be obtained from:

POSTAL HEADQUARTERS,
OVERSEAS POST DIVISION,
ROOM G13, ST. MARTIN'S-LE-GRAND,
LONDON EC1A 1HQ.
TELEPHONE: 01-432 5999

The Post Office

ENCIRCLE TI 502 ON PAGE 419 FOR FURTHER INFORMATION

United Kingdom Mineral Statistics 1975

This review of all mineral statistics relating to the United Kingdom, is the third in a series produced annually by the Institute of Geological Sciences. It is an attempt to encompass in one source all the statistical information on production, trade and consumption of minerals and their derivatives collected by various government departments, and industrial and trade organisations. Data for England, Wales, Scotland, Northern Ireland, and individual counties are featured, and the statistics – in metric units throughout – are illustrated by numerous diagrams.

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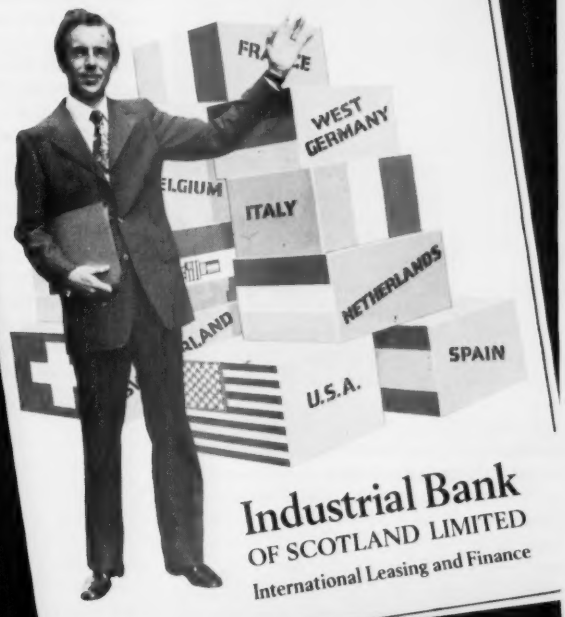

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ENCIRCLE TI 500 ON PAGE 419 FOR FURTHER INFORMATION

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Stopping vehicle thefts

Criminals will find it difficult to steal unattended vehicles or parked trailers which are fitted with two new security products launched by Worcester Fasteners Ltd.

The first is an entirely new type of vehicle immobiliser. The design of the 'Veloc' is solely mechanical and overcomes the objections and difficulties which have surrounded earlier attempts to produce such a device. Seen and approved in principle by all interested parties, it can be fitted to any known make of light, medium, or heavy goods vehicle in up to two hours and for a total cost of around £190.

It comprises a very tough, outer casing containing a valve mechanism, which is connected into the circuit of one of the vehicles service systems, for example, the air brake lines. Secured in a very special way to the floor of the vehicle so that it is not easily tampered with, it has a single operating lever which is locked into the 'on' position by means of a high-security lock. The standard 'DV' model, intended for medium to heavy goods vehicles, will fit any vehicle with air brakes. Other, 'SV' models, operating on hydraulic clutch lines, are available for small vans or light commercial vehicles not having air circuits.

Total security for parked trailers is difficult, but one of the thieves' simplest and most prevalent techniques – just hitching the trailer to their own tractor and driving it off – can be thwarted by use of the Veloc trailer king-pin lock, priced at £55. This is a clamp, machined from solid steel bar and incorporating a high-security lock, which simply fits around the trailer's king pin.

For both products the company can provide mastered key systems to suit a customer's particular requirements. For example, a large national haulier might have different keys for all drivers, but with sub masters covering all those operating out of each regional depot, and an overall master at headquarters.

Further information: circle 370

Marine navigation lantern

Trials on a new type of mast top lantern, designed and now to be manufactured in commercial quantities by Flint and Brown Ltd of Chobham, were completely successful with the lantern withstanding forces rising to 35g, vital in the case of thrashing spinnakers.

The Marinaspec M7000 mast top lantern is the first manufactured to combine, in one assembly, navigation, port, starboard and stern lights with brilliant warning/morse capabilities and integral low power anchor lighting.

Further information: circle 371

Diesel welder

The latest diesel welder to be introduced by Petbow Ltd of Sandwich provides welding current between 60-400 amps dc at a 70 per cent duty cycle.

Further information: circle 373

Colour TV test card

Critical colour matching of studio colour television cameras is aided by a new test card. It is a meticulously lighted, exposed and printed colour reproduction of a live model, made for Porta-Pattern by the fine arts printing specialists W. R. Royle and Sons Ltd who developed the chart in close collaboration with the Television Service and Research Department of the BBC. This latest addition to the Porta-Pattern test chart system, BBC Test Card no. 61 – flesh tone reference, is now available from Crow of Reading Ltd.

The use of the new test card eliminates the slow, expensive and uncertain effort to match simultaneously the camera flesh tone responses by means of a live model. When the cameras have been light balanced with the logarithmic reflectance gray scale chart, the final line-up with any fine adjustment can be achieved in a matter of seconds with the new test chart.

The flesh tone reference offers instant availability and a consistent quality and colour saturation as it presents no problem caused by summer sunburn or winter paleness. The picture has no limiting highlight to confuse matching, and its flesh tone colour saturation has been adjusted to give optimum results after gammer correction. Furthermore, a flat image means that substantially the same picture is seen by all the camera with virtually no variation in lighting or angle; consequently, it is easier to compare directly the pictures produced by different cameras.

Further information: circle 372

Medium-weight shelving system

A medium-weight adjustable steel shelving system suitable for commercial, industrial and similar applications, is announced by Nicholl and Wood, manufacturers of the Zamba range of domestic shelving.

The new Zamba mid-weight shelving is supplied in kits complete with all the necessary attachments to assemble a complete six-shelf unit; this avoids the necessity of poring over catalogues to ensure that the right type and number of corner brackets, bracing stays and other attachments are ordered. Each shelf is capable of supporting a distributed load of 170kg (375 lb) – equivalent to the weight of 31 5 litre tins of motor oil or 190 telephone directories. This is adequate for numerous applications in offices, industrial premises, garages, shops, schools and colleges, etc where more costly industrial shelving systems are often unnecessary.

Further information: circle 374

Multi-purpose air hammer

OS501-P is a multi-purpose air hammer introduced by Desoutter Brothers Ltd. It is designed to accept a wide range of attachments for rivet busting, panel cutting and needle scaling. A range of general purpose chisels is available from stock. The Desoutter needle scaling attachment incorporates hardened steel needles in a light-weight, compact design and will clean any surface, particularly weld beads, depressions, rivet heads and corners.

Further information: circle 375

Power supply data acquisition

A versatile data acquisition system has been developed by Ferranti Ltd, to provide the power supply industry and power consumers with a more compact and powerful metering information service than has previously been possible. Employing the latest electronics developments, the Ferranti Series 75 metering information data acquisition system counts data on up to 128 separate input channels and, at predetermined intervals, provides a coded serial output. This can be used to drive a teletype machine, giving a record of the counts in printed form and also as a computer-compatible punched tape.

The Series 75 logic is assembled in modular form on a series of printed circuit cards. The logic elements are CMOS, offering the advantages of large scale integration together with low power dissipation, high noise immunity; and great reliability. Input data is of the two state form, normally being presented as two distinct voltage levels typically being derived from a switched output. Each change of state is entered as a count of between one and 15, depending on the weighting factor involved.

Channel counts are individually totalled and, if specified, are summated together in any combination that is appropriate. When a large total count is produced division facilities can be incorporated to reduce this to an acceptable working number. Input pulses are counted and recorded for each demand period, the period length being determined by a pulse train obtained from an external or internal clock pulse generator. This pulse train is also used to operate the time and date unit.

Further information: circle 376.

High pressure hydraulic pump

A. Long and Co Ltd announce the introduction of a new high pressure reciprocating pump for operation at up to 1,050 bar (15,000psi). With many uses in the oil, chemical, construction, shipbuilding and general industrial fields, the new RBT 200 pump is capable of delivering 680 litres/minute (150 gallons/minute).

Developed over a period of years, the pump is available in three forms, giving low, standard, and high operating pressure ranges, with pressures up to 1,400 bar with a high pressure head. All models are fitted with stainless steel valves, and are suitable for use with seawater. Featuring an alloy steel crankshaft and a nitrided herring bone reduction gear train, the power frame is capable of handling drives of up to 250hp with the ability to transmit maximum power over a wide range of pump input speeds.

Built to specific customer requirements the new pump can operate between 250 and 2,000rpm with a corresponding change in fluid delivery.

Further information: circle 377

Fireproofing valve actuators

The second stage of the Pyrosak method of achieving fire-resistance for electric valve actuators, made by Rotork Controls of Bath. The inner 'vest' comprising several layers of glass cloth has been laced in position and the outer 'jacket' of aluminised asbestos lined with glass cloth is being fitted over it. This technique costs around £250 per actuator – a fraction of that normally spent on specially built enclosures. During tests an actuator protected by Pyrosak withstood a total of 12¼ minutes at the heart of a petroleum fire and was afterwards found to still be operable.

Further information: circle 379

Greenfly massacre

Containing pirimicarbs, this aerosol spray clears a rose bush of greenfly in 30 minutes, without harming beneficial insects such as bees or ladybirds and lacewing, the natural predators. During last year's hot summer greenfly made a large-scale invasion and made devastating attacks on roses. If not beaten off immediately the greenfly sucks the sap spoiling blooms and coating the rose with a honeydew which eventually disfigures the plant. The plant protection division of Imperial Chemical Industries at Fernhurst which developed the spray has recently won the Queen's award for technological achievement.

Further information: circle 378

Parliament

Monday, 16 May

Industrial co-operation with USSR

John Biggs-Davison (Epping Forest) asked the Secretary of State for Trade, if, pursuant to his reply of 2 May to the hon member for Epping Forest on industrial co-operation with the USSR, he would now quantify the effect on the balance of payments.

Mr Meacher replied that it was not possible to calculate the effect of the co-operation programme on the balance payments. Deliveries made under contracts for capital plant and equipment were usually spread over a number of years and frequently did not commence until a year or or after contract signature. In any event it was not possible to extrapolate from the published trade figures deliveries relating to particular countries.

Film industry representation

Stephen McAdden (Southend East) asked whether the Secretary of State for Trade was aware of the dissatisfaction which existed amongst distributors and exhibitors of films with regard to their inadequate representation on the newly-appointed Film Industry Interim Action Committee; and whether he would take action to remedy this.

Mr Meacher said, as was announced to the House on 22 July 1976, that if the chairman was to have a compact team to assist him, membership could not be representational. The committee had a duty to consult widely with the industry and in this way distributors, exhibitors and others would be able to represent their interests fully.

Birmingham airport

Mr Mackay (Birmingham, Stechford) asked if the government had finalised its plans for any extension of the runways at Birmingham airport.

Mr Clinton Davis stated that consultations with the local authorities and others concerned on the document Airport Strategy for Great Britain were now completed and the secretary of state hoped to make a statement about future airports policy, including the role of regional airports such as Birmingham just before or just after the summer recess.

Aircraft noise

Toby Jessel (Twickenham) asked, following the petition from Whitton residents, what action the Secretary of State for Trade intended to take to reduce aircraft noise in Whitton.

Mr Clinton Davis said, 'We are continuing with the existing noise abatement measures but I do not intend to make any alteration to the Mole Valley routes this summer. Such alterations only involve shifting aircraft noise from one place to another. Later in the summer I shall let those concerned have our analysis of the proposals that have been put to us. I would stress, however, that the only real hope for a reduction in aircraft noise lies in the progressive introduction of quieter aircraft.'

Concorde services

Terry Walker (Kingswood) asked the Secretary of State for Trade, what encouragement his department had given to British Airways about beginning Concorde flights to Singapore and Australia as soon as possible.

Mr Clinton Davis replied that the government was pursuing discussions with the countries concerned so that the permissions required would be available before British Airways wished to start services to Singapore and Melbourne; their first priority was to build up the New York service.

Company accounts filing fee

Carol Mather (Esher) asked on what date the fee for filing company accounts with the Registrar of Companies was increased, by what amount it was increased; what percentage increase this represented and what was the percentage increase in inflation over the same period.

Mr Clinton Davis stated that a fee of £20 was required on the registration of a copy of an annual return. The fee was increased to this level in June 1975 having previously, since 1967, been set at £3 (which compared with a charge of £5 recommended by the Jenkins Committee in 1962). This increase of 567 per cent compared with a rise of 121 per cent in the retail price index over the same period; but, as he explained to the House at the time, part of the increase was designed to discourage moribund or completely inactive companies from remaining on the register.

Power plant industry

Phillip Whitehead (Derby North) asked the Secretary of State for Industry, when he would outline his department's policy on the power generating industry, so far as it affected the firms of Babcock and Wilcox and Clarke Chapman Ltd.

Mr Cryer said that the problems and the future of the power plant industry was urgently being examined in the light of the measures in the CPRS report. 16/5

Jim Lester (Beeston) asked the Secretary of State for Industry, what number of jobs his department estimated might be saved in the power plant manufacturing industry by bringing forward the ordering of the Drax B power station.

Mr Cryer replied that on its own, an order for Drax B might have little effect on long-term employment in the industry, stability for which was likely to be achieved only by a series of measures based on those proposed in the CPRS report.

Take-over bid report

Mr Cant (Stoke on Trent Central) asked the Secretary of State for Prices and Consumer Protection, whether he has yet received the report of the Monopolies and Mergers Commission on the take-over bid by Duckham/BP for Century Oils Ltd; and when he expects to publish his decision.

Mr Fraser replied that the secretary of state received the report on 4 May and was considering it. He would announce his decision and lay the report before parliament as soon as possible.

Consumer credit

George Rodgers (Chorley) asked the Secretary of State for Prices and Consumer Protection, if he would make a statement about the implementation of the Consumer Credit Act 1974.

Mr Fraser stated that he had made an order which would bring into force further provisions of the Consumer Credit Act. The provision in the act making the creditor liable jointly with the supplier in respect of a misrepresentation or breach of contract where the credit was extended under a pre-existing arrangement between the supplier and the creditor, would be effective from 1 July. From 1 October it would be an offence to canvass or solicit debtor-creditor agreements (cash loans) off trade premises except where the visit had been requested in writing or in certain limited circumstances allowed by the Director General of Fair Trading. The provision in the act prohibiting the sending of unsolicited credit cards would be effective from 1 July and from the same date it would be an offence to send to a minor any document inviting him to borrow money, obtain goods or services on credit or hire or to apply for information on credit or ihre.

See *Trade and Industry*, 20 May, page 320.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

Tuesday, 17 May

British Leyland

Michael Grylls (North West Surrey) asked the Secretary of State for Industry, what had been the annual percentage rise or fall in output of vehicles of British Leyland in the years 1975-76, 1974-75, 1973-74 and 1972-73, respectively; and what had been the average weekly vehicle production rate of British Leyland in the years 1975-76, 1974-75, 1973-74 and 1972-73, respectively.

Mr Huckfield stated that this information was not available from official sources. The output of British Leyland in the years 1972 to 1975 was published by the Society of Motor Manufacturers and Traders in the 'Motor Industry of Great Britain 1976'. Information in respect of 1976 would be included in the 1977 edition of this publication.

Michael Grylls (North West Surrey) also asked what were the annual vehicle sales for British Leyland in the years 1975-76, 1974-75, 1973-74 and 1972-73.

Mr Huckfield replied that this information is published in the report and accounts of British Leyland for 1976.

Vegetable price index

Ivor Clemitson (Luton East) asked the Secretary of State for Prices and Consumer Protection, what, according to the latest monthly figures available, was the retail price index for vegetables; and what were the figures for the corresponding months in each of the preceeding three years.

Mr Fraser gave the following retail price index information for vegetables, which includes potatoes:

Vegetables, fresh, canned and frozen	
January 1974 = 100	
March 1974	107
March 1975	137
March 1976	250
March 1977	296

Merchant marine

Mr Churchill (Stretford) asked the Secretary of State for Trade, what was the number of vessels and the overall tonnage of the British merchant marine in the years 1950, 1960, 1070 and 1976; and what information he had on comparable figures for the Russian merchant marine.

Mr Clinton Davis gave the information in table 1 (right).

Mr Churchill (Stretford) also asked for an international league table of the top 20 merchant fleets, by tonnage, for the years 1956, 1966 and 1976, respectively.

Mr Clinton Davis gave the information in table 2 (right).

Mr Churchill (Stretford) also asked what percentage of British export tonnage was carried in non-United Kingdom flag merchant ships in each year since 1970.

Mr Clinton Davis gave the following information:

Per cent

	Non-UK flag carryings
1970	53
1971	56
1972	60
1973	57
1974	56
1975	54
1976 (provisional)	55

Mr Churchill (Stretford) also asked what was the gross tonnage of the British merchant fleet in each year since 1960.

Mr Clinton Davis gave the following information:

Year	Gross registered tonnage
1960	21,130,874
1961	21,464,522
1962	21,658,142
1963	21,565,150
1964	21,489,948
1965	21,530,264
1966	21,541,740
1967	21,716,148
1968	21,920,980
1969	23,843,799
1970	25,824,820
1971	27,334,695
1972	28,624,875
1973	30,159,543
1974	31,566,298
1975	33,157,422
1976	32,923,308

Passenger landing tax

Ivan Lawrence (Burton) asked what consideration had been given to the institution of a passenger landing tax at airports; and how much would have been raised in each of the past five years if a charge of £2 per passenger had been made.

Mr Clinton Davis replied that he assumed that reference was being made to a passenger landing tax levied by the government as a source of general revenue, in which case he would point out that no consideration had been given to the introduction of such a tax at United Kingdom airports. It was estimated that in the last five years a tax of £2 per arriving passenger would have produced the following amounts:

	£ million
1972	39
1973	43
1974	40
1975	42
1976	45

Ugandan civil aircraft

Neville Trotter (Tynemouth) asked how many times civil aircraft belonging to Uganda had landed in the United Kingdom during 1977.

Mr Clinton Davis replied that total arrivals and departures of the aircraft referred to at Stanstead Airport for the period January to April 1977, including a few positioning flights with empty aircraft, had numbered 105.

Table 1.

	UK		USSR	
	Number of vessels	Gross registered tonnage	Number of vessels	Gross registered tonnage
1950	6,060	18,219,247	967	2,124,823
1960	5,246	21,130,874	1,138	3,429,472
1970	3,822	25,824,820	5,924	14,831,775
1976	3,549	32,923,308	7,945	20,667,892

Table 2.

	1976	1966	1956
1	Liberia	UK*	USA
2	Japan	USA	UK*
3	UK	Liberia	Norway
4	Norway	Norway	Liberia
5	Greece	Japan	Italy
6	USSR	USSR	Japan
7	Panama	Greece	Netherlands
8	USA	Italy	France
9	France	Federal Republic of Germany	Panama
10	Italy	France	Federal Republic of Germany
11	Federal Republic of Germany	Netherlands	Sweden
12	Sweden	Panama	USSR
13	Spain	Sweden	Denmark
14	Netherlands	Denmark	Canada
15	Singapore	Spain	Spain
16	Denmark	Canada	Greece
17	India	India	Argentina
18	China, People's Republic of	Argentina	Brazil
19	Poland	Brazil	Finland
20	Cyprus	Poland	Australia

* UK described as Great Britain and Northern Ireland in 1966 and 1956. The source of this information is the relevant annual issue of Statistical Tables of Lloyd's Register of Shipping, copies of which are available in the House of Common's Library.

Breaches of prices regulations

George Rodgers (Chorley) asked the Secretary of State for Prices and Consumer Protection, how many prosecutions had been put in hand by his department relating to breaches of the regulations governing prices during the last three years.

Mr Fraser said that there had been no prosecutions by his department.

Tourism in the regions

Sir John Eden (Bournemouth West) asked the Secretary of State for Trade, if he was satisfied that sufficient effort was being made to publicise to visitors from overseas the attractions of areas outside London; and if he would summarise the various efforts that were being made in that direction.

Mr Meacher said that at the request of government, the statutory tourist boards had increased the publicity and information services provided for tour operators overseas and for foreign visitors in order to promote tourist attractions outside London. The British Tourist Authority (BTA) would spend about two-thirds of its 1977/78 advertising budget for the benefit of the regions and in co-operation with national boards a substantial amount of foreign language literature with this aim was provided in BTA's overseas office and at the main ports of entry. Some local authorities co-operated with BTA in joint ventures to promote the attractions of their region and he knew that the BTA would welcome extension of this form of co-operative publicity. In considering allocations of their resources he hoped other local authorities would bear it in mind.

Rate of growth of textile market

Nicholas Winterton (Macclesfield) asked for the current rate of growth of the United Kingdom domestic textile market; how many textile companies or firms went into liquidation during the last 12 months; and for what reasons; and for the current level of textile imports in the UK to the latest convenient date.

Mr Meacher said it was estimated that the domestic market for textiles (as defined in order XIII of the standard industrial classification) had increased, in constant 1970 price terms, by about 3 per cent between the fourth quarter of 1975 and the corresponding quarter of 1976. The domestic market had been defined as sales of textiles by the United Kingdom industry less exports plus imports.

Mr Clinton Davis pointed out that there had been winding-up orders for the compulsory liquidation of three companies, and receiving orders against two sole traders, in the textile industry in England and Wales in 1976, which was the latest 12 months for which figures were available. The reasons for these insolvencies were not known. Corresponding figures for creditors' voluntary liquidations and members' voluntary liquidations were not available.

Mr Meacher continued that it was estimated that in the fourth quarter of 1976 imports of textiles (as defined in order XIII of the standard industrial classification) had accounted for 27 per cent of the value of the domestic market.

Wednesday, 18 May

Imports of textiles and apparel

Nicholas Winterton (Macclesfield) asked the Secretary of State for Trade, if he would list the total amounts of textile and apparel imports for each of the last eight years.

Mr Meacher gave the following information:

	£ million cif
1969	377
1970	397
1971	515
1972	607
1973	868
1974	1,131
1975	1,211
1976	1,624

Note:
These figures cover wool tops, synthetic and regenerated (artificial) fibres and textile yarn, fabrics and made-up articles (including clothing).

Senior counsel in Scotland

Kevin McNamara (Kingston upon Hull Central) asked the Secretary of State for Prices and Consumer Protection, when he expected to implement the Monopolies and Mergers Commission's report on the supply in Scotland by senior counsel alone of their services; and if he would make a statement.

Mr Fraser pointed out that as a result of the discussions which had taken place between the Director General of Fair Trading and the Faculty of Advocates, in the light of the Monopolies and Mergers Commission's report, all existing prov-

isions which had restricted the freedom of senior counsel in Scotland to appear alone had now been lifted and, in their stead, the faculty had now formally adopted a resolution which permitted senior counsel to appear alone if they wished. In its report, the Monopolies and Mergers Commission had concluded that the restrictions on supply by senior counsel alone of their services operated against the public interest because on occasions they caused unnecessary expense to litigants and wasted junior counsel's time. Under the new resolution, before sending instructions to a senior counsel to act alone, a solicitor would be expected to ask him in good time, whether or not he would be prepared to accept instructions in that particular case on that basis. In reaching his decision, a senior counsel would be entitled to take into account not only the circumstances of the case but also his personal circumstances and other commitments. Since 1970 senior counsel in Scotland had been free, though not obliged, to appear alone in criminal cases. The effect of the faculty's resolution was to extend this ruling to court appearances in civil cases. As far as drafting work was concerned, the previous restrictions prevented senior counsel from drafting documents themselves related solely to the preparation of pleadings. The faculty's resolution incorporated a relaxation of those restrictions where the pleadings were incidental to a court appearance in which the senior counsel was acting alone. The arrangements introduced by the faculty appeared to be a satisfactory method of implementing the Monopolies and Mergers Commission's report. However, in order to appraise the success of the resolution in operation the Director General of Fair Trading had agreed with the faculty that the new arrangements should be reviewed after two years.

Thursday, 19 May

Furniture discount chains

John Garrett (Norwich South) asked the Secretary of State for Prices and Consumer Protection, if he would investigate the alleged refusal of leading furniture manufacturers to supply furniture discount chains, and if he would estimate the effect on furniture prices of this policy.

Mr Fraser pointed out that the Director General of Fair Trading was responsible for examining allegations of this kind. Without knowing more about the policies described he could not estimate their precise effect on prices, but any restriction on competition was liable to maintain prices at a higher level than they would otherwise be.

Proportion of wages spent on food

Esmond Bulmer (Kidderminster) asked what proportion of the average industrial wage was now spent on food.

Mr Fraser pointed out that information on how households spent their income was given in the family expenditure survey. The latest available data, which covered the year up to June 1976, showed that households whose expenditure patterns formed the basis of the general index of retail prices spent on average 25 per cent on food (including 3.3 per cent on meals out) out of an average total weekly expenditure of £60.42. Full details of the family expenditure survey for the year to June 1976 were given in vol. 85 no. 3 (March 1977) of the *Department of Employment Gazette*.

Planning agreements

Dr Oonagh McDonald (Thurrock) asked the Secretary of State for Industry, if he would make a statement about the importance he attached to the process of negotiating planning agreements with the top 100 companies.

Mr Cryer said the government remained fully committed to the system of planning agreements, and it was his objective to make progress as rapidly as possible in discussions with important companies, not necessarily confined to those in the top 100. See also page 387.

Compensation for shareholders in shipbuilding

Hugh Dykes (Harrow East) asked what proportion of the total compensation payments for shareholders in shipbuilding companies was expected to be paid out by the government by: (a) vesting day, (b) one month after vesting day, (c) three months after vesting day and (d) later than three months; what further particular practical problems might occur in negotiating the terms of compensation for nationalisation, to be paid out to shareholders and companies under the Aircraft and Shipbuilding Act 1977; when it was expected to fix the compensation payment dates for the shipbuilding companies to be nationalised under the Aircraft and Shipbuilding Act 1977; and if a progress report would be given on the negotiations now taking place with the companies to be taken into public ownership under the Aircraft and Shipbuilding Act 1977; the firm date when compensation was expected to be paid; and in what form the payment would be effected.

Mr Huckfield said Whinney Murray and company, as the government's advisors on the compensation payable under the Aircraft and Shipbuilding Industries Act 1977, were at present collecting from the companies concerned information needed for the valuation. Meanwhile, an introductory meeting had been arranged with the stockholders' representatives collectively. The timing of compensation payments would depend on the progress of the negotiations, which would have regard to the circumstances of each case. Compensation would be satisfied by the issue of government stock.

TV sets

Peter Viggers (Gosport): asked for the current manufacturing capacity in the United Kingdom for: (a) colour television sets and (b) monochrome sets; for sales of both during each of the last three years, and for an estimate of such sales during the current year.

Mr Cryer regretted that the information was not available. The highest annual sales by UK manufacturers of colour television sets had been 2,125,000 in 1973, and it was not thought that current manufacturing capacity was less than at that time. Because of the progressive change in demand from monochrome to colour, a similar deduction of black and white sets would not be meaningful.

Sales of television sets by UK manufacturers. were published in Business Monitor PQ 365.2 The figures for the last three years had been as follows:

	Colour	Monochrome
1974	1,947,000	669,000
1975	1,586,000	538,000
1976	1,544,000*	560,000*

* provisional

It was not possible to give an estimate of the level of sales in the current year.

Advance factories in Sunderland

Kenneth Clarke (Rushcliffe): asked how many advance factories were empty and available for occupation in Sunderland; on what date they had been completed; how many advance factories were under construction in Sunderland; and why the government, in the light of those figures, had announced plans on 28 February 1977 for seven more advance factories to be built in that town.

Mr Cryer admitted that there were two advance factories empty and available in Sunderland, both of which had been completed in April 1976. Four more were under construction. The six combined could provide jobs for approximately 300. The total unemployed stood at 14,000 in the Wearside TTWA a the end of February. The need for action to reduce this high total had led to the announcement on 28 February of seven additional factories in Sunderland which could provide some 324 more jobs. This number of factories could be expected to be let within a reasonable length of time.

North-east and Merseyside

Robert Kilroy-Silk (Ormskirk) asked the Secretary of State for Industry, how many firms had been referred by his department to: (a) the north-east and (b) Merseyside in: (1) the last year and (2) the last six months.

Mr Cryer regretted that information in the form requested was not available. However, during the 12 months up to 30 April 1977, 80 firms from outside the northern region had visited locations in the north-east and 42 firms from outside the north-west region had visited locations in Merseyside. For the six months up to 30 April 1977, the corresponding figures had been 45 and 23 respectively.

Main frame computer industry

Edward Lyons (Bradford West) asked what financial support had been given by his department to the main frame computer industry for each year since 1968; what financial support had been given for research and development in the telecommunications industry for each year since 1971–2; and what research and development had been sponsored in the radio, radar and electronic capital goods sector since 1971–2 with the amount of public funds expended or allocated for this purpose.

Mr Cryer said that the following payments had been made to ICL Ltd under the computers merger scheme 1968, and the Science and Technology Act 1965. The final payment had been made on 30 September 1976.

	£ million		£ million
1968–69	4.35	1973–74	9.45
1969–70	4.0	1974–75	10.2
1970–71	3.25	1975–76	8.3
1971–72	2.25	1976–77	3.25
1972–73	11.95		

In addition some of the assistance given under more general support schemes for the computer industry had gone to the mainframe manufacturers. It would be impracticable to separate this, but the total assistance under these schemes (advanced computer technology project and shared cost development contracts) had been:

	£ million		£ million
1968–69	0.8	1973–74	2.3
1969–70	0.7	1974–75	1.0
1970–71	1.0	1975–76	0.7
1971–72	0.7	1976–77	0.9
1972–73	0.8		

Mr Cryer went on to say that in addition to any financial assistance for regional investment, financial support by the Department of Industry for research and development in the telecommunications industry (minimum list heading 363) had been approximately as follows:

	£ thousands
1972–73	100
1973–74	100
1974–75	169
1975–76	379
1976–77	763

In addition to any financial assistance for regional investment, financial support by the Department of Industry for research and development in the radio, radar and electronic capital goods sector (minimum list heading 367) – mainly for avionics, hydrographic and data buoy equipment, marine simulator and satellite communications earth stations had been approximately as follows:

	£ thousands
1972–73	315
1973–74	180
1974–75	344
1975–76	1,367
1976–77	1,599

Research in the electronic components industry

Edward Lyons (Bradford West) asked what financial assistance had been provided by the government to promote research and development in the electronic components industry for each financial year since 1971–72.

Mr Cryer said the amount of financial assistance provided by the Department of Industry and its predecessors to the electronic components industry had been as follows:

	£ thousands
1971-72	273
1972–73	873
1973–74	1,350
1974–75	1,869
1975–76	2,251
1976–77	3,131

In addition, the Ministry of Defence had contributed to R and D in the electronic components industry; this was the concern of the Secretary of State for Defence.

Expenditure on combatting oil pollution

Kenneth Warren (Hastings) asked what had been the expenditure by the government on the provision of goods and services to combat oil pollution, or the threat of oil pollution, at sea in each of the financial years since 1968–69.

Mr Clinton Davis acknowledged that while the task of preparing for and dealing with oil spills at sea involved several departments, his own had the major operational role. The amounts incurred, excluding overheads, by the Department of Trade in each financial year since it had assumed responsibility for oil clean-up action at sea, expressed in round figures, were set out below. The principal matters covered were the purchase and maintenance of equipment, transport and dispersant; storage accommodation; tug conversion; training and exercises; minor unattributable spills. Expenditure incurred in major incidents, which in general was recovered from the shipowner, was not included; nor was the cost of continuing research into clean-up methods.

	£
1970–71	37,500
1971–72	90,000
1972–73	116,000
1973–74	82,000
1974–75	118,000
1975–76	438,500
1976–77	304,000

Trade deficit with EEC

Neil Marten (Banbury) asked for the balance of trade deficit, at seasonally adjusted values, with the common market for the 12 months to the end of March 1977, and whether the figures for the first quarter of 1977 were an improvement over the same period of 1976.

Mr Meacher said that figures on a balance of payments basis for the first quarter of 1977 were not yet available. The following were the crude trade balances (ie exports fob less imports cif) with the rest of the EEC:

	£ million overseas trade statistics basis, seasonally adjusted
1976 1st quarter	478
1977 1st quarter	580
1976 2nd quarter–1977 1st quarter	2,324

Imports of TV sets from Japan

Kenneth Clarke (Rushcliffe) asked how many colour television sets had been imported into the UK from Japan in each of the last five years.

Mr Meacher gave the following information:

	Thousand sets
1972	156
1973	269
1974	202
1975	165
1976	143

Friday, 20 May

Planning agreements

Dr Oonagh McDonald (Thurrock) asked the Secretary of State for Industry, how many planning agreements were in the process of discussion with the top 100 companies, and how many planning agreements with the top 100 companies were nearing completion.

Mr Cryer said that announcements had been made about planning agreement discussions with five category one companies*. Of these a planning agreement had been made with Chrysler (UK). Talks with British Leyland had been suspended during the present review and discussions with the other companies in the turbine generator and process plant industries had been deferred pending the outcome of the government's consideration of the Central Policy Review Staff's report. Explanatory talks were in progress with a number of other companies in category one.

* Category one companies, broadly speaking, include manufacturers with total annual home sales of £50 million or more and service companies with total home sales of £20 million or more. All construction and distribution companies are excluded from category one.

Electronics industry R and D

Nigel Forman (Sutton, Carshalton) asked the Secretary of State for Industry, if he would give an estimate of the total spent on research and development in the electronics industry in 1976-77, and the proportion of the total funded by the government.

Mr Cryer answered that the latest available estimate of total industrial expenditure on research and development on electronics and telecommunications (including computers) was from the 1972 survey when industry reported expenditure of £179.4 million of which £74.0 million or 41 per cent was financed by the government. The next survey for 1975 was nearing completion and the results were expected to be published next month.

Advanced instrumentation project

Nigel Forman (Sutton, Carshalton) asked the Secretary of State for Industry, what financial assistance had been granted by his department under the advanced instrumentation project for each year since 1972-73.

Mr Cryer explained that under the advanced instrumentation project the department contributes not more than 50 per cent of the cost of selected development projects with individual firms. Annual contributions by the department since 1972 have totalled:

1972/3	£65,000
1973/4	£84,000
1974/5	£101,000
1975/6	£172,000
1976/7	£487,000

Advanced computer technology project

Nigel Forman (Sutton, Carshalton) asked the Secretary of State for Industry, what financial assistance had been granted by his department under the advanced computer technology project for each year since 1972-73.

Mr Huckfield replied that financial assistance provided by the Department of Industry through the advanced computer technology project since 1972 has been:

1972-73	£665,000
1973-74	£604,803
1974-75	£381,425
1975-76	£496,218
1976-77	£611,857

Electronics research establishments

Nigel Forman (Sutton, Carshalton) asked the Secretary of State for Industry, if he would list all government research establishments which were engaged in research in electronics; and what was the budgeted expenditure for each one in the current financial year.

Mr Huckfield said that none of the laboratories for which his department was responsible were engaged in research in electronics to any significant degree. His department, however, did commission research in electronic materials and devices at Royal Signals and Radar Establishment Malvern, a Ministry of Defence Establishment, which in 1977/78 is estimated to cost £0.5 million.

Lighting industry R and D

Nigel Forman (Sutton, Carshalton) asked the Secretary of State for Industry, what financial assistance had been granted by his department to support research and development in the United Kingdom lighting industry.

Mr Cryer said that within the last few years there had been no financial support given by his department for the purposes mentioned. However, a Chief Scientist's (Electrotechnical) Requirements Board had recently been formed which was aimed at encouraging R and D projects in the whole of the electrical industry, including the lighting industry.

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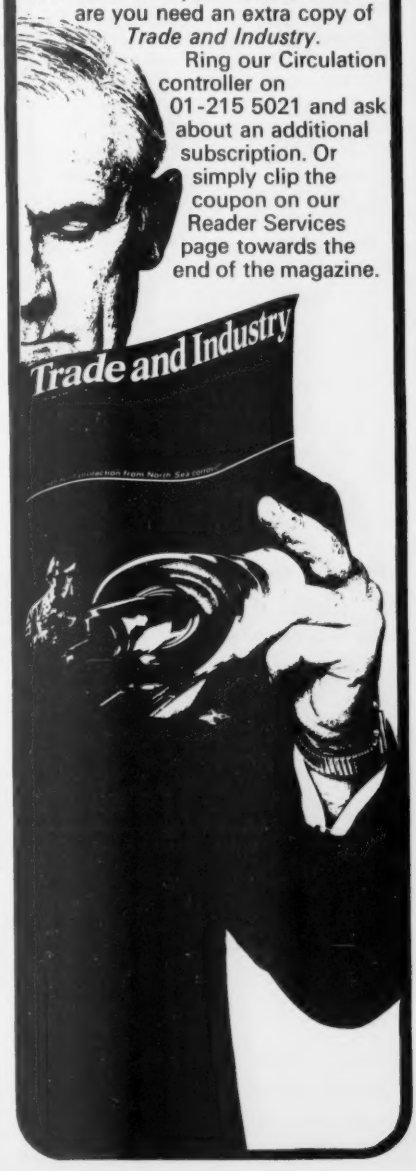


All ship-shape at NMI

The National Maritime Institute was set up in 1976 to continue the maritime experimental work formerly carried out by the National Physical Laboratory. Projects range from the aerodynamic stability of towers, bridges and offshore structures to hull design, and testing the shape of towed underwater bodies. Jennifer Clarke reports.

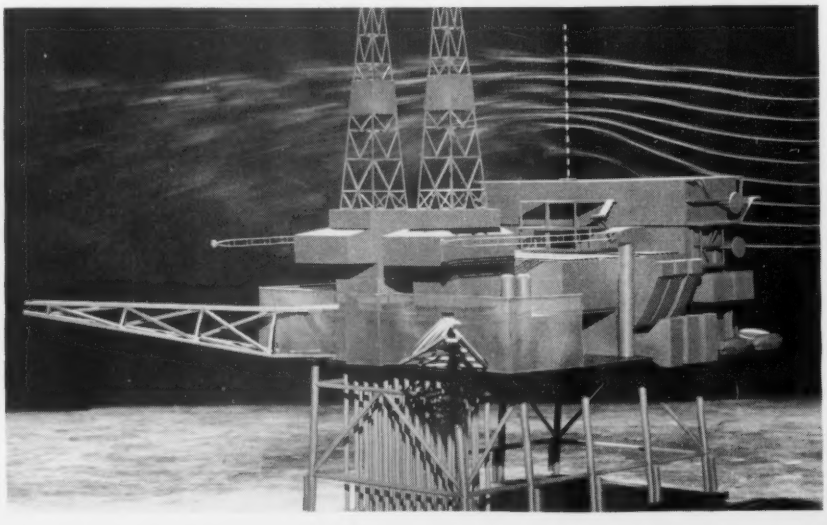
When the Suez canal was finally reopened, ships had become larger and the traffic had increased. To help improve the waterway, the National Maritime Institute (still at that time known as the Ship division of the National Physical Laboratory) was given a project by consultants acting for the Egyptian government to find out how ships would behave in a reconditioned canal. In the past, some ships had been simply run aground on a bank to let another vessel through, but a better solution seemed to be to make it wider and deeper allowing room to moor ships in laybys. At Feltham, NMI was able to make a model of the canal and run ships up and down to study the effects on the banks of the Nile. Certain forces, caused by 'interaction' can arise when two ships begin to approach each other in shallow water, and this had to be studied carefully since in the Suez canal, the width of the waterways is restricted. NMI was asked to advise on factors such as the minimum distances between two ships, or between a ship and the bank, at different speeds and in various different circumstances.

Models are frequently used to test proposals – for instance to look at the shape of a ship's hull or propellor. According to J. W. Nichols, the new institute's director, NMI has repeatedly found cases where modifications have been necessary. There have even been instances where the ship would not steer properly. A model can be capsized and it is obviously cheaper, quicker and safer to experiment with models than carrying out trials with the ship itself. Using these techniques, advice can be given on how to achieve the best possible results, within the restraints of design requirements. In this way, NMI have already carried out work on the design of ships for commercial firms in the UK and abroad.

The models used are sometimes built of wax, which has the advantage of being both quick and re-useable, also minor modifications can be made fairly easily. Wax is suitable for hull resistance tests in still water but is not robust enough for tests in waves. For trials involving seaworthiness and manoeuvrability, polyurethane foam is used and wood is reserved for models needed for testing over a longer period.

One of the tanks at Feltham is designed as a circulating water channel, in which the water is pumped past the model. The depth can be varied by raising and lowering the floor. In this tank it is possible for instance to look at a ship's propeller while it is operating. This can reveal faults in the design, as when the propellor draws streams of air bubbles out of the water. An uneven flow of water into the propeller can often cause the whole ship to vibrate, and can bring a crew to the verge of mutiny. For this reason, Sir Vivian Fuchs asked NMI to study the design of the propeller on the British Antarctic Surveys research ship *Bransfield*. A severe case of bad flow was diagnosed, and modifications were made to the hull which cured the vibration. (Earlier this year it was reported that the *Bransfield* had just successfully delivered

Left : the Christchurch Bay tower, designed to study wave forces on a coastal structure in order to improve existing methods for predicting loads caused by the actions of the sea and to help with the framing of safety regulations for offshore rigs and platforms. Right : a model of an offshore platform in one of the wind tunnels at NMI Teddington. The model is constructed of a number of separate pieces which can be tested in different positions so that the implications of platform layout on the airflow over the helicopter landing pad can be studied.



stores to the most southerly British scientific base at Halley Bay in Antarctica, something in the nature of a rescue operation.)

During the war, when there were still only two towing tanks at Teddington, one of these was commandeered for the trial of Barnes Wallis' famous bouncing bomb and years later, was to figure in the film 'The Dam Busters' in an authentic reconstruction of the test.

The tanks at Feltham are now being used for offshore investigations. By using a model of a drilling rig, NMI is able to determine its maximum speed under tow, its directional stability while being towed, and the amount of rolling and pitching caused by the waves. By making an exact replica of a North Sea jacket structure, the precise process of the up-ending of the platform can be studied, flooding the buoyancy tanks in stages so that it sits on the sea bed. The complete operation can then be simulated in all sorts of sea conditions.

Other projects have studied the towing of large rigs, launching them from a barge and up-ending them, and no less important, making sure there is enough power for the tow (without which precaution, it could prove a somewhat embarrassing exercise, or possibly, lack of exercise, for all concerned).

Part of the secret of studying offshore structures is knowing what wave-heights to contend with. Many people consult NMI, for interpretation of existing data and forecasts of expected wave-heights.

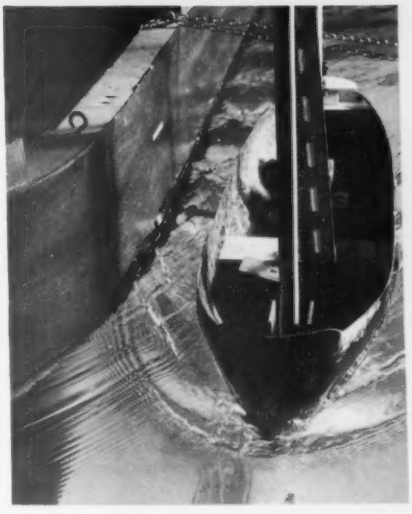
Wind effects, on offshore platforms, are also the subject of study. This includes looking at air turbulence over helicopter decks, which, if misplaced could seriously affect production.

In recent years, many new factory chimneys have appeared with a spiral metal decoration, technically known as straking. Needless to say, its purpose is more than purely ornamental. The result of research carried out by Dennis Walshe, straking prevents cylindrical structures oscillating in the wind, particularly important in the case of television relay transmitters, for instance, where movement of this kind can interfere with the direction of the transmitted beam and spoil the quality of the picture.

With a long-span bridge, wind-induced oscillations can be extremely dangerous, as was seen in the case of the first Tacoma Narrows Bridge, in the US which collapsed in 1940 in moderate winds of about 42 miles per hour. Since then, aerodynamic stability tests have been carried out on all long span bridges. This has led to major advances in the design of suspension bridges, due to refinements of theory and to the type of wind-tunnel testing which is carried out at NMI Teddington. Here, bridges have been studied at the development stage, trying out different shapes and introducing various modifications. In this way, work was carried out on the design of the Severn bridge, beginning by looking at sections of the bridge suspended in a wind-tunnel. It was known that a high torsional stiffness could best be achieved with sections shaped in what is now known as a 'closed box' deck structure, but oblong boxes were thought to be unstable in the wind. A suitable shape of box was eventually designed, the outcome of wind tunnel experiments by scientists in what was then known as NPL's Aerodynamics division. According to experts the precise shape of the box is critical to aerodynamic stability. More recent investigations have centred around the new Humber bridge which is now due to open next year.

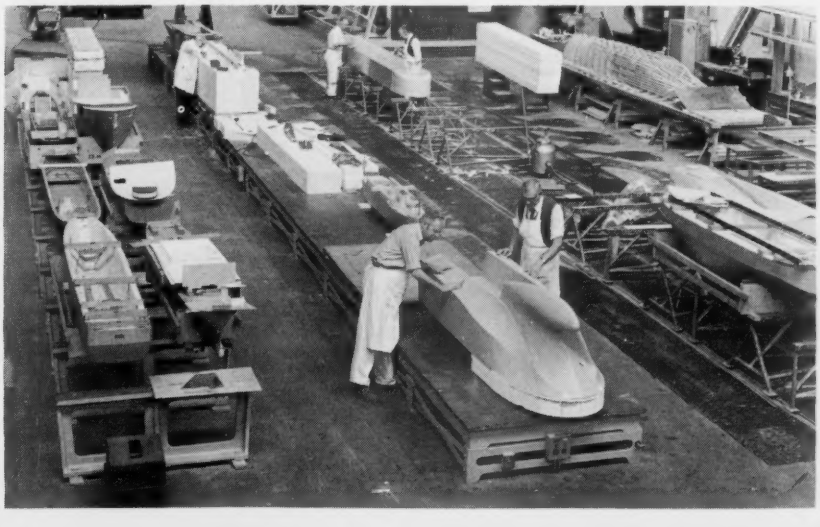
One of the few compressed air tunnels in the world, and certainly the largest of its type in Europe, operates at NMI Teddington. Inside, the air pressure can be increased to 25 times normal atmospheric pressure. Ironically enough this makes it easier to reproduce conditions outside, when measuring the wind loading on large cylindrical structures such as cooling towers, stacks and offshore platforms, the increase in density of the air compensating for the reduced physical scale. (That well-known landmark, the Post Office tower, was first tested here in model form.) It is also used for the study of flows around the wetted surfaces of ship's hulls and various high-speed vehicles.

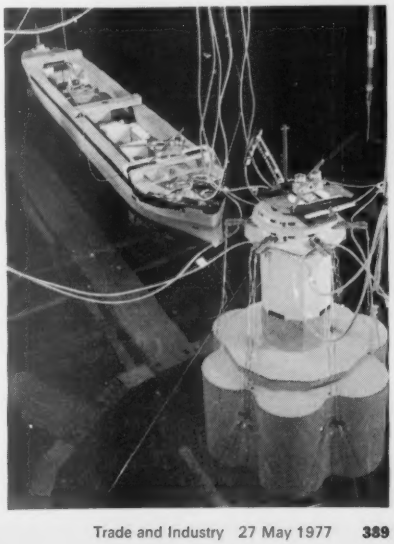
Because of the cost of offshore platforms, interest centres around ideas for cheaper designs. One way in which considerable savings might be made, in deeper waters, would be by building floating platforms, anchored by cable to the sea bed. Tethered buoyant platforms, or 'tension leg platforms', as they are sometimes called, have gone beyond mere theoretical existence in the minds of designers. To be precise, models of them now exist attached by cables to the floor of a wave tank at NMI. By using these models, it has been possible to look at different types of design, with various configurations of cables, and to demonstrate what would and what would not be a practical proposition. Obviously, to operate satisfactorily the platform must be able to carry a considerable payload but excess weight leads to the risk of cables becoming slack in the waves, which would be a highly dangerous situation.



A model tug draws level with the bow of a large tanker, while both vessels are moving forward. At this point forces tend to push the bow of the tug away from the bigger ship, but as the tug moves forward to overtake, these forces will suddenly reverse, dragging the tug across the bows of the tanker. This illustrates part of NMI's work on interaction.

Left : the model manufacturing shop at NMI. Right : 'Scotbuoy' a single point mooring oil storage and transfer system, developed by Seven Seas Engineering, Glasgow. The model is being tested as part of the feasibility study to determine the likely limiting weather conditions for oil transfer. Investigations were also conducted to confirm the survival of the buoy alone, in the largest wave likely to be encountered in 100 years. Tests were carried out for Y-ARD Ltd, Glasgow.





European community news

UK determined on real progress in fisheries policy

At their meeting in Brussels on 16 and 17 May EEC agriculture ministers agreed to meet again in Luxembourg on 27 June to decide on herring conservation measures for the period after the end of June and to consider all aspects of the internal fisheries regime. The UK government is determined that real progress should be made then towards the adoption of definitive arrangements that adequately reflect the importance of the fishing industry in the UK.

John Silkin, Minister of Agriculture, Fisheries and Food, made this point when he was reporting to the Commons on 18 May on the outcome of the agriculture council. He explained that the council had considered a proposal by the commission for a regulation to govern fishing for herring in the waters of member states in the period 1 June to 31 December this year.

The UK had supported the commission's proposals for a continuation of a temporary ban in the North Sea until the end of the year and for a system of quotas for the west of Scotland stock under which the UK would receive over 70 per cent of the total allocations. Mr Silkin pointed out that the majority of delegations, despite the scientific evidence, had favoured the allocation of quotas in the North Sea for the remainder of the year. This had not been acceptable to the UK.

Mr Silkin said that eventually ministers had agreed to extend the North Sea ban until the end of June, except for a small special quota for the Netherlands to enable her to meet the requirements of the traditional June festival. It was also agreed that a ban on herring fishing off the west of Scotland be introduced for the month of June. The latter measure would not affect UK fishermen since they normally did not start fishing for herring off the west of Scotland until the late summer.

Gavin Strang, Parliamentary Secretary at the Ministry of Agriculture, Fisheries and Food, who represented the UK for discussions on agricultural matters in the council had said that the calculation of monetary compensatory amounts (mcas) on pigmeat must be adjusted to remove difficulties to which they gave rise. The commission had now tabled a proposal which, if agreed, would allow the commission to reduce mcas on certain products, including pigmeat. It was intended that the implications of this proposal should be clarified urgently at official level with a view to the council's taking a decision on it at its next meeting in June.

Mr Silkin also said that ministers had agreed to a directive on pure bred cattle. This would remove obstacles to intra-community trade, subject to the necessary animal health rules. 'I am confident that as a result our exports of pure bred cattle will be benefited in due course.'

The council had also discussed measures on wine, and on the so-called butterships, operating mainly from north German ports, which offer cheap butter to their passengers, but final decisions were deferred until the next meeting.

Finally Mr Silkin said that in view of criticisms that had been made against commissioner Tugendhat by some ministers earlier in the meeting, the commissioner had approached him and asked to be allowed to make a statement to the council and to answer questions. Mr Silkin said he had acceded to this request and had given Mr Tugendhat the opportunity to make an opening statement, to hear criticisms, and to reply.

Commissioner in London

Christopher Tugendhat (right), commissioner responsible for budget control and financial institutions, with Edmund Dell, Secretary of State for Trade in London on 19 May. During his one-day visit to the UK, the commissioner discussed insurance with Mr Dell and the two agreed on the importance of insurance in the community for UK industry and the necessity for the common market to be implemented in this field as soon as possible.

Publication of EEC medical directives order

An order in council published on 19 May*, which comes into effect on 10 June, makes the changes in UK law necessary to give effect to the EEC medical directives. It will enable doctors who are nationals of any of the EEC member states and have a recognised qualification awarded in a member state to be authorised to practise in the UK. Corresponding provisions have been or will be made in other member states.

The order includes a provision for the registration of doctors from the EEC to lapse after a period, normally six months, unless the doctor concerned has satisfied the General Medical Council that he has the necessary knowledge of English. This was announced by David Ennals, Secretary of State for Social Services, on 5 April (see *Trade and Industry*, 15 April, page 79).

Other provisions of the order follow the lines of the consultative document on the implementation of the directives which the government issued to interested bodies in March last year.

The GMC has already been designated – and this is confirmed in the order – as the authority competent to issue the new 'certificates of specialist training' which will be the recognised UK specialist qualification for the purposes of free movement within the community. The GMC is to maintain a list, called the 'specialist list' of doctors who are nationals of any member state and have specialist qualifications entitled to recognition within the community.

* The Medical Qualifications (EEC Recognition) Order 1977. 1977/827 HMSO Price 25p.

Silkin 'shares concern of pig producers'

Following the ruling of the European court of justice in Luxembourg on 21 May that Britain should cease forthwith the temporary pig subsidy, John Silkin, Minister of Agriculture, Fisheries and Food said he understood and shared the concern of pig producers.

The minister who was speaking on 22 May said that he was awaiting the text of the court judgement. 'I will study it urgently immediately it is received in order that I may consider its implications with my colleagues.'

Mr Silkin said that British pig producers could be assured that he would continue to fight hard on their behalf in the council of

agriculture ministers – as he had done since he was appointed eight months ago – for a favourable and permanent solution to the problem created by the present system of calculating the monetary compensatory amount (mca) subsidies which gave an unfair advantage to European exporters of bacon and other pigmeat products to the British market.

FMF sixth national conference

Roy Hattersley, Secretary of State for Prices and Consumer Protection, and Roy Jenkins, president of the commission, are due to appear as guest speakers at the Food Manufacturers' Federation's sixth national conference on 26-27 September.

The theme of the conference will be 'Feeding the Nation' and it will be held at the Grosvenor House Hotel. For further information contact John M. Rose, Food Manufacturers' Federation 1-2 Castle Lane, Buckingham Gate, London SW1E 6DN, tel. 01-828 7822.

Commission proposals for a review of the social fund

The commission has approved and sent to the council proposals drawn up by vice-president Henk Vredeling for making the European social fund better adapted to the present difficult situation in the employment market and for increasing the effectiveness of the payments made from the fund*.

The council is due in the coming months to review its decision of 1 February 1971 which reformed the social fund and amend it if necessary on the basis of an opinion from the commission. The commission believes that in addition to issuing such an opinion this is also an opportune time to review the various implementing regulations and to make proposals for their improvement in the light of the experience of the past five years. It also seems appropriate to take into consideration other possibilities of intervention by the fund which go beyond vocational training and geographic mobility of workers.

Until now, the main activity of the social fund has been to improve employment opportunities for workers in the community by subsidising 50 per cent of the cost of vocational training schemes in the member countries.

Since the fund was reformed, more than 2 million persons have benefited from its retraining aids and the annual credits have increased from 235 million units of account (mua) in 1973 to 617 mua in 1977. Following the reforms introduced in 1971, the fund became a more flexible instrument for coping with employment problems. By a series of decisions the scope of the fund became progressively enlarged and the following groups of workers became eligible for assistance: farmers leaving the land; workers in the textile and clothing sectors whose skills must be readjusted; migrant workers; the handicapped; unemployed persons under 25; workers in the underdeveloped regions or regions with declining activities; workers who are forced to adapt owing to technical progress; and workers affected by the difficulties encountered by certain groups of enterprises.

In the framework of the last three areas of intervention, women over 35 years and elderly workers were listed among those groups which qualified for retraining aid. This rapid expansion in the range of the fund's activities has led to certain difficulties, says the commission, such as the danger of a too wide dispersal of the fund's interventions, delays in adjusting to the demands of the labour market and delays in processing applications and payment of aids.

*COM (77) 90

EEC foreign ministers at Leeds Castle

EEC foreign ministers during their meeting at Leeds Castle on 21-22 May. *Photo Col*

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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EEC rules of competition

The *Official Journal of the European Communities*, L117 of 9 May 1977, contains the text of a European commission decision dated 19 April 1977 relating to a proceeding under article 86 of the treaty of Rome.

The decision – 77/327/EEC – Aardolie Belangen Gemeenschap BV (ABG) and Avia Nederland CV (AVIA)/Benzine en Petroleum Handelmaatschappij BV, British Petroleum Raffinaderij Nederland BV and British Petroleum Maatschappij Nederland BV (BP) (reference DGIV/28.841), concerns an application received by the commission on 4 January 1974 from ABG and AVIA for an initiation of proceedings for a decision finding that articles 85 and 86 of the treaty had been infringed during the winter of 1973-74 by a number of oil companies operating in the Netherlands.

The commission found that BP alone had abused its dominant position during the period of shortage by reducing its supplies of motor spirit to ABG not only substantially but also proportionately to a much greater extent than in relation to its other clients. BP applied dissimilar conditions to ABG and placed that company at a competitive disadvantage; ABG was, moreover, a competitor of BP in the motor spirit market.

The commission did not consider it appropriate to impose a fine on BP in view of the confused situation at the time of the offence.

Further information: Department of Prices and Consumer Protection, Fair Trading Division, 1 Victoria Street, London SW1 0ET, tel. 01-215 5092.

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is now published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757, ext. 7174/482/408. Other information may be obtained from the reference point given at the end of the item.

Common agricultural policy

The texts of the following regulations and decisions which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

General. Corrigendum. The *Official Journal* L116, 7 May 1977 contains the following correction to regulation (EEC) 937/77 laying down detailed rules for the application of regulation (EEC) 878/77 on the exchange rates to be applied in agriculture (published in *Official Journal* L110, 30 April 1977):
Page 2, article 2 (1), second line:
for: 'article 5 (2)'
read: 'article 4 (2)'.

Wine. Regulation (EEC) 966/77 amending for the fourth time regulation (EEC) 2805/73 as regards the maximum sulphur dioxide content of certain white quality wines (*Official Journal* L115, 6 May 1977).

Milk and milk products. Regulation (EEC) 968/77 laying down detailed rules for the granting of private storage aid for long-keeping cheeses during the 1977/78 milk year (*Official Journal*) L115, 6 May 1977).

Regulation (EEC) 977/77 fixing the amount of the aid for skimmed-milk powder for use as feed (*Official Journal* L116, 7 May 1977).

Regulation (EEC) 978/77 amending the annex to regulation (EEC) 532/75 concerning the recovery on exportation of aids granted in respect of skimmed-milk powder for use as feed and in respect of skimmed milk processed into compound feedingstuffs (*Official Journal* L116, 7 May 1977).

Regulation (EEC) 984/77 amending article 2 (1) of regulation (EEC) 756/70 on granting aid for skimmed milk processed into casein and caseinates by replacing '5.30 units of account' by '5.55 units of account'.

Regulation (EEC) 1005/77 fixing the adjustments to be made to refunds fixed in advance for milk and milk products (*Official Journal* L120, 13 May 1977).

Animal health. Decision 77/331/EEC authorising Denmark and the Netherlands to apply special health guarantees for the prevention of leukosis in the case of bovine animals imported for breeding or production (*Official Journal* L116, 7 May 1977).

Decision 77/345/EEC amending decision 77/268/EEC on certain measures to prevent the spread of classical swine fever (*Official Journal* L121, 14 May 1977).

Oils, fats and oilseeds. Regulation (EEC) 983/77 amending article 2 (1) of regulation (EEC) 3188/76 on rules for the implementation of the special measures for the determination of offers of olive oil on the world market and on the Greek market (*Official Journal* L118, 11 May 1977).

Regulation (EEC) 1003/77 amending article 10 of regulation (EEC) 205/73 on communications between member states and the commission concerning oils and fats (*Official Journal* L120, 13 May 1977).

Compensatory levy arrangements after 30 June 1977

The compensatory levy system will continue to apply to the following 'third country' products imported into the UK for processing and subsequent delivery to another member state of the EEC after 30 June 1977:

cereals imported before 1 August 1977;

rice imported before 1 September 1977;

fruit and vegetables, live trees and other plants, bulbs, roots and the like, cut flowers and ornamental foliage, and products processed from fruit and vegetables, imported before 1 January 1978;

any other products, imported before 1 July 1977; in the case of beef and veal this effectively means before the end of the 1976-77 marketing year since inward processing relief is not available for beef and veal imported after that date for processing and subsequent delivery to another member state of the EEC.

The system, described in Customs and Excise notice 241, will continue to apply until such time as all the products mentioned above have been disposed of. This means, in the case of products imported under inward processing relief arrangements, until stocks are exhausted or the time limit granted by the authorisation for inward processing relief has expired, whichever is the earlier.

Both options described in notice 241 will be open to traders. The compensatory levy percentage applicable with effect from 1 July 1977 will be 100 per cent.

Any inquiries concerning these arrangements should be addressed to any local office of Customs and Excise, the address of which will be found in the telephone directory, or to International Customs, Division G, Branch 3, King's Beam House, Mark Lane, London EC3R 7HE.

Exporting to Efta after transition

As from 1 July 1977, the preferential rates applicable to imports of most goods into Efta countries from all nine member states of the EEC will be harmonised*. The exceptions are referred to as 'sensitive products'.

As a result, for goods other than 'sensitive products', it will no longer be necessary to comply with the special provisions set out in part III of Customs and Excise notice 810 or to endorse movement certificates 'article 25(1) satisfied'. The conditions and the endorsement will be applicable only to 'sensitive products'.

Full details of the goods and the related Efta countries covered by the 'sensitive products' classification will be published in a future edition of *Trade and Industry* and will also be available from International Customs Division E, Branch 4, Adelaide House, London Bridge, London EC4, tel. 01-626 1515.

Export relief for 'sensitive products'
As from 1 July 1977, it will be permissible to claim export relief on EEC originating materials used in the manufacture of 'sensitive products' (see above) which are claimed to be originating under the origin rules explained in part III of notice 810. The special condition in paragraph 32 of the notice will accordingly cease to be applicable and entitlement to export relief will be governed by the conditions in paragraph 24.

Movement certificate form EUR1
The title of box 4 of form EUR1 has been amended to 'Country, group of countries or territory in which the products are considered as originating'. Stocks of the revised form bearing serial numbers prefixed by the letters H, J or a subsequent letter will be available shortly. Exporters are advised to destroy any of the earlier forms they may have in stock as soon as they have obtained supplies of the revised forms. As from 1 July 1977, only the revised form EUR1 will be accepted.

Form EUR2
As from 1 July 1977 the only version of form EUR2 which may be used is form C 1297 (revised 1976).

Customs notice 810
In order to gain preferential admission into an Efta country, exported goods must satisfy the origin rules laid down in the free trade agreement between the EEC and that particular country. Some of the origin rules are complex and to make them more easily understandable to exporters they were set out in as simple a form as possible in the revised Customs and excise notice 810 issued in October 1976 and all exporters are advised to check that they have the latest version of the notice. Copies can be obtained by contacting either their local office of Customs and Excise or International Customs Division E, Branch 4, (address as above).

An important change resulting from the new format of the rules in the revised notice is the new form of the declarations to be made on application forms for movement certificates. These declarations are set out in appendix G to the notice on pages 172 and 173 and ought now to be used by all exporters of originating goods.

* Article 25(1) of protocol no. 3 to the free trade agreements.

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Overseas trade news

Dell warns against euphoria on balance of payments surplus

A warning against too much euphoria about the present trend into surplus of the UK balance of payments came from Edmund Dell, Secretary of State for Trade, on 19 May.

Speaking to the British Importers' Confederation in London, Mr Dell also warned against the dangers of protectionist pressures in trade policy. He stressed that it was in the national self interest of nations to preserve an open world trading system and said the British government would be supporting the renewal of the OECD trade pledge for a further year.

Mr Dell noted that the latest figures for the balance of payments in April continued a trend which provided 'persuasive evidence' that the UK was in fact moving out of a balance of payments deficit into surplus, 'a fact which cannot but be of great significance for our economic future'.

But he pointed to three grounds for caution: first, the responsibility for this change in trend lay primarily on the accident of North Sea oil and rather less on UK success as an exporter of manufactured products; second, he said it was necessary to remember that it had been achieved against the background of far higher unemployment than had been experienced in this country at any time since the war, and therefore insofar as it was a success it represented the success of a still depressed economy; and, third, the UK inflation rate was still far too high, far higher than that of most of Britain's major industrial competitors.

Although the balance of payments was moving towards surplus, one of the lessons, reinforced by recent years, had been of the competitive weakness of the UK manufacturing sector taken as a whole, although pleasure could be taken in the very substantial advances in the UK's invisible earnings which had been a vital element in sustaining the standard of living during the last few years, Mr Dell said.

Referring to the current round of multilateral trade negotiations, Mr Dell pointed out that, though it was a mutual interest that these negotiations should be successful, a certain realism was necessary in defining the objectives and assessing the benefits of success.

'The benefits of success are far more likely to be in the political field and in helping to resist protectionist pressures,' he said 'than in any direct and immediate consequences for world trade.

'And of course a very great impetus would be given to the success of the multilateral trade negotiations if nations which still lag behind their obligations under present agreements, brought themselves in line.'

Meacher announces more action on dumped steel

Michael Meacher, Parliamentary Under-Secretary of State for Trade, has announced that from 19 May a provisional charge of £15 per tonne is to be placed on imports of Japanese steel flats pending the completion of the Department of Trade's full anti-dumping investigation. The action follows an anti-dumping investigation against Japanese sections and flats which was announced in March and a provisional charge against Japanese sections which was announced on 7 April.

Mr Meacher announced this latest move at a meeting with a delegation of Sheffield MPs, unionists and management concerned about the industry on 18 May. The meeting was also attended by Leslie Huckfield, Parliamentary Under-Secretary of State for Industry.

Mr Meacher pointed out that the UK had taken more anti-dumping action than any other country in western Europe and had more anti-dumping action in the steel sector than in any other sector.

'The department has done, and will do, more to protect the industry than ever before. Shortly I hope to announce quantitative and price arrangements for reinforcing bar imports from South Africa which will ensure a far better future for the industry than anti-dumping action.'

Turning to the special steel industry in Sheffield, he reminded the delegation that anti-dumping action was not a panacea. Special steels, he said, were some of the most complicated cases the UK had had to tackle.

One company, for example, might produce 49 grades of steel in different sizes at a variety of prices and all this would have to be carefully checked during an investigation.

Mr Meacher also warned of the dangers of retaliation. 'A country against whom we have acted might respond with anti-dumping action against UK steel exports.'

Brazilian energy minister visits UK

Meeting with Edmund Dell, Secretary of State for Trade (extreme right), and officials from both the British embassy, Brazil, and government departments is Dr Shigeaki Ueki, Brazilian Minister of Mines and Energy (extreme left). During his visit Dr Ueki visited the North Sea Forties oil field and met a number of industrialists and bankers involved in the energy, offshore and mining sectors in Brazil.

UK-Saudi joint commission takes new initiatives

At the second session of the UK-Saudi Arabian joint commission held in Riyadh from 9 to 11 May both delegations acknowledged the good progress in a number of fields of co-operation which had been made in the year since the last meeting and paid tribute to the part played by the Department of Trade's economic co-operation office in Riyadh.

The excellent work by the British Council, which is assisting with training and education, by the Department of Health and Social Security to further co-operation over a wide range of health and medical subjects, and by the Ministry of Overseas Development to assist the development of Saudi Arabian agriculture were particularly highlighted. All these areas are of major importance to the future development of Saudi Arabia.

The joint commission set up a full programme of work for the coming year, consolidating and expanding the efforts in the fields already mentioned, and taking some new initiatives notably in the fields of environmental health, infrastructure development, and in the administrative and financial arrangements for setting up technical co-operation projects. Action was also taken on problems encountered in certain individual projects and discussion also covered the questions of bid prices and contract conditions.

During the joint commission sessions the UK side had meetings with five ministers of the Saudi government and with several deputy ministers. At these meetings proposals by British commercial organisations for undertaking projects in Saudi Arabia were discussed and the UK side was assured by the Minister of Industry and Electricity, Dr Ghazi al Gosaibi, that the British firms which had been involved in tenders which had recently been cancelled were not precluded from participating in future in these or any other projects in Saudi Arabia.

Responding to suggestions from the Saudi Arabian side, the UK representatives made proposals for a double taxation agreement and an investment protection agreement. Both measures, if successfully negotiated, could further improve the scope for co-operation between UK and Saudi Arabian enterprises. The joint commission noted that already 65 UK-Saudi Arabian joint ventures had been established.

John Caines, under secretary, Department of Trade, led the UK delegation, and Shaikh Abdullah Alireza, deputy minister, Ministry of Foreign Affairs, led the Saudi Arabia delegation. The joint commission was set up in October 1975 and held its first session in March 1976.

Over 120 firms to exhibit in E. Europe . . .

Over 120 British firms are to exhibit, with the support of the British Overseas Trade Board, at two major international exhibitions in eastern Europe during June.

The biggest joint venture will be at the Poznan international fair, from 12 to 21 June, when 102 British firms – compared with 91 in 1976 – will exhibit a wide range of equipment and technical expertise in a new permanent British pavilion which will be officially opened by the Lord Mayor of London, Sir Robin Gillett. The new pavilion will help to stimulate Britain's trade with Poland and re-emphasises the importance Britain attaches to this market.

In Moscow, at the international exhibition of electrotechnical equipment and power transmission from 9 to 23 June, 26 British firms will exhibit in a joint venture co-sponsored by the British Electrical and Allied Manufacturers Association. British products on show will include electronic control equipment, industrial floor cleaning machines, viscometers, data control equipment, induction heaters, discharge detectors and turbine internal components.

. . . and British TV products go to Montreux

Eighteen British companies supported by the British Overseas Trade Board and sponsored by the Electronic Engineering Association will exhibit at the tenth international television equipment exhibition to be held in Montreux from 3 to 9 June. The joint venture will be once again the largest national participation.

Among a host of British products on show there will be a source indent generator, transcoders, portable television camera mountings, prompters, a caption roller unit, a vector analyser, remote frame phasing and change-over units.

The Montreux exhibition is one of the major events of its kind worldwide. Held every other year, it is attended by top technicians and broadcasting specialists from all over the world, including China and countries from eastern Europe, the Middle East and Africa.

Visits by commercial officers

The following overseas commercial officers are expected to be in this country shortly, when they will be available for discussions:

Seoul: P. Fluck, second secretary (commercial) in Seoul since June 1975; available September 1977.

Muscat-Oman: A. N. King, second secretary (commercial) in Muscat since October 1976; available September 1977.

Because commercial officers often have only limited time at their disposal it may not always be possible to fit everyone in. Where it is possible, firms are reminded that the Export Services and Promotions Division of the Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU, which is in close touch with all overseas commercial officers can very often supply advice, or the information that applicants hoped to obtain at the interview. Outside London, the regional offices of the Department of Industry, Welsh and Scottish Offices and the Department of Commerce Belfast, can also help.

British firms and organisations who wish to meet the officer are asked to write for an appointment, giving full details of the specific export problem and commodities involved. Firms in Northern Ireland should contact the Export Branch of the Department of Commerce, Belfast; those in Wales, the Welsh Office, Cardiff; and those in Scotland, the Scottish Office, Glasgow. Firms in the eastern region and the London and

Oldham and Son signs US marketing agreement

Oldham and Son Ltd, battery manufacturers of Denton, Manchester, part of the Carlton Industries Group, has signed a reciprocal marketing agreement with United States battery manufacturers, Eagle-Picher Industries Inc of Cincinnati, Ohio, makers of almost all the batteries used in the United States space shots. At the signing ceremony at Painter Stainers Hall in the City of London on 5 May were, left to right: Borrie Hyman, counsellor for commercial affairs, United States embassy; Fred Sieglinger signing for Eagle-Picher Industries; Dennis Holden, managing director, Oldham and Son; and Mr R. G. Robinshaw, Department of Trade.

south-eastern region (and any organisation in the other regions who would prefer or be prepared if necessary to meet the officer in London) should write to Tours Section, Department of Trade, 50 Ludgate Hill, London EC4M 7HU. For all other regions firms should contact the appropriate Department of Industry regional office (exports).

ECGD backs second foreign currency loan . . .

Just two days after the signing of the first foreign currency buyer credit the Export Credits Guarantee Department announced on 19 May that it was backing a second credit.

The $13.5 million ECGD-guaranteed loan has been arranged and made available by Grindlay Brandts to the Korea Iran Petroleum Co, a joint-venture company between Ssangyong Cement Industrial Co and the National Iranian Oil Co, to help finance a contract awarded to Foster Wheeler of Reading for the supply of UK goods and services for a $170 million lubricating and fuel oil refinery to be constructed at Onsan, South Korea.

. . . and £6 million loan for Iran

A £6 million loan which Morgan Grenfell and Co Ltd, acting on behalf of a syndicate of London and Scottish Clearing Banks, has made available to GAA Tehran Taj One Ltd has been guaranteed by the Export Credits Guarantee Department.

The loan will help finance a £11.3 million contract awarded to Cementation International Ltd.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1617: Imports of textiles from Thailand – revised arrangements

The European community has negotiated and initialled an agreement with Thailand on trade in textiles for the calendar year 1977. The agreement provides for voluntary restraint to keep exports to the community of certain textile products intended for domestic consumption at agreed levels, and will apply as from 1 January 1977. Pending enactment of the community legislation to conclude the agreement its provisions are being operated de facto as set out below. Should the subsequent legislation result in any change in the provisions outlined here, however, a further notice to importers will be issued.

Scope of the agreement and quantitative levels to be applied

The textile items covered by the agreement and the levels to be adhered to by Thailand in respect of their exports to the UK in the table above are shown.

The quota level and arrangements for importing goods in category 2 have already been announced in notice to importers 1601 (*Trade and Industry*, 11 March 1977), and those arrangements continue to apply. The goods in categories 1, 1(a) and 3 were previously subject to UK surveillance licensing; the outstanding surveillance licences issued under those arrangements in respect of these newly restricted goods will be revoked with effect from 1 June 1977.

Category/tariff heading/description of goods	Quota
1/55.09, ex 56.07 Other woven fabrics of cotton and woven fabrics of synthetic textile fibres (discontinuous or waste) of which	1,213 tonnes
1(a)/55.09, ex 56.07 Other woven fabrics of cotton and woven fabrics of synthetic textile fibres (discontinuous or waste) *other than unbleached or bleached*	733 tonnes
2/ex 60.04 Under garments, knitted or crocheted, not elastic nor rubberised, *other than those of silk or noil or other waste silk, of flax or of ramie,* the following: shirts, T-shirts, vests, singlets and the like	1,400,000 pieces
3/ex 60.05 Outer garments, knitted or crocheted, not elastic nor rubberised, *other than those of silk or noil or other waste silk,* the following: jerseys, pull-overs, slip-overs, twinsets, cardigans, bed-jackets and jumpers.	2,672,000 pieces

Licensing arrangements

The Thai authorities will administer the quotas by issuing export certificates to their exporters for onward transmission to UK importers. These certificates should be submitted by UK importers in support of a completed form ILB/A to Import Licensing Branch at the address shown above, which will issue import licences up to the appropriate quota limits.

Goods in transit

The Thai authorities will issue export certificates in respect of these newly restricted goods for consignments exported from Thailand on or after 1 June 1977. Goods in transit to the UK before that date will count against the quota if exported from Thailand after 31 December 1976, and will be licensed without the need for an export certificate to be produced, provided that satisfactory documentary evidence of the date of shipment of such goods is supplied in support of a completed form ILB/A.

Imports for re-export

Imports of these restricted textile items will not be set off against the quotas if they are re-exported outside the EEC. The general import licensing arrangements for restricted textiles re-exported from the UK are set out in notice to importers 1441.

UK surveillance licensing arrangements

Imports of most textiles from non-EEC countries which are not subject to quantitative restrictions are subject to UK surveillance licensing arrangements. Descriptions of the goods and the licensing arrangements are set out in notices to importers 1484 and 1502.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 367.

Visit of West German electronics mission

Members of an electronic components mission from the Federal Republic of Germany visiting the production plant of Belling and Lee of Enfield. The mission members were guests of the Electronic Components Industry Federation and the British Overseas Trade Board and during their stay from 9 to 18 May they visited British firms and saw the production of all types of electronic components.

Overseas trade exhibitions

Britain's strength on show at Houston offshore conference

From F. Paul Pedersen, British consulate-general, Houston

Once again British industry invaded the 'oil capital of the world', and played an even more impressive role in the ninth annual international offshore technology conference (OTC) held in Houston, Texas, from 2 to 5 May. This year's exhibition, the largest ever, consisted of some 3,900 exhibits representing more than 1,700 companies, primarily international manufacturers and suppliers of equipment to the oil and gas industries, from 17 countries.

The OTC exhibition this year again utilised the entire Astrodomain complex, including an additional 45,000 sq ft, and has now reached a total of 401,000 sq ft. In parallel with the rapid growth of OTC in size and stature, British representation has also kept pace accordingly. This year has seen the British national display grow to 24,000 sq ft with some 180 companies on 79 stands.

This year's OTC attendance broke last year's record, reaching about 65,500 and consisting of scientists, engineers, designers, businessmen, and media representatives from over 115 countries (including nearly 2,000 from the UK). The annual offshore technology conference, as apparent from the continued growth of the international representation, has unquestionably become by far the largest and the premier event for the oil and gas industries in the world.

The technical programme for the conference included 47 sessions covering both state-of-the-art and new technology in every major area of offshore resource development. Papers ranged from topics on wind and wave forces and deep-ocean mining to materials and corrosive drilling operations.

This year's British exhibit was the fifth joint venture sponsored by the British Overseas Trade Board and the Association of British Oceanic Industries (ABOI). The successful layout of previous years was basically repeated this year with the centre position devoted to information stands manned by ABOI, and the British consulate-general, Houston, which shared a joint stand with the Offshore Supplies Office of the Department of Energy. Also included in this centre section once again was the British pub, which gave exhibitors bar and lounge facilities where they were able to have discussions with their contacts in an informal atmosphere. The British sector was still the largest foreign exhibit both in terms of members and size. The other national groups present were from the Netherlands, France, Norway, Canada, Japan, Sweden, Denmark, Germany, Italy, Belgium, Newfoundland and Labrador, the Republic of Ireland and Romania.

Britain's continued technological growth in the oil and gas industry, principally in the North Sea, continued to attract the attention of oil industry experts worldwide who were interested in keeping abreast of the latest developments of British industry.

Engineering know-how

Several exhibitors confirmed that engineering know-how as well as hardware packages were being sought by Americans as well as other foreign oil experts. Britain is about to enter into a new era of the oil and gas industry: one where engineering and design capability will become a more sought-after commodity, in addition to the traditional purchasing of British hardware. The extent of the advances in Britain's engineering technology in offshore oil development can be judged by the fact that, for the third year in succession, British companies were the recipients of an 'emeritus award' for their innovative engineering contributions to the oil and gas industry. Sponsored by the *Petroleum Engineer International* magazine and organised by a committee of seminar representatives from leading oil companies, the awards were presented to Vickers Offshore Engineering Group and Osprey Electronics Ltd.

In addition to sponsoring the British contingent as exhibitors, ABOI again organised a trade mission of about 30 members; it also arranged one of the official lunches. The *Aberdeen Press and Journal*, in co-operation with the North East Scotland Development Authority and the Highlands and Islands Development Board (leading officials from these organisations again attended OTC), once again organised a large group of about 100 members.

Dr J. Dickson Mabon, Minister of State at the Department of Energy, was present at OTC and, accompanied by Roy Fox, consul-general in Houston, and officials from the Department of Energy, he toured the British exhibits and met local firms and individuals involved in many aspects of the oil and gas industries.

In its nine-year history, the offshore technology conference has become the world's leading international technical forum and showplace devoted to the display and development of offshore resources and the protection of the ocean environment. The fact that it has been necessary to establish such a conference is representative of the ever-changing and demanding face of technology in the energy-hungry world. Although the

Dr J. Dickson Mabon, Minister of State at the Department of Energy (left), at the offshore technology conference in Houston.

12 months from May 1976 have not produced many revolutionary innovations in the field of technology, developments have been made. There could not be progress without the advancement of technology and there would be no technology but for the skill and inventiveness of the engineer.

British contingent gets the dough at IBA

From C. Pattinson, British consulate-general, Munich

IBA '77, the international bakery exhibition which took place in Munich from 7 to 15 May was a resounding success in every way, especially for the British exhibitors.

The IBA is held every three years and was last held in Dusseldorf in 1974. This year's fair attracted almost 100,000 trade visitors from literally all over the world and included strong contingents from Australia, Japan, United States, Chile and South Africa.

These visitors were able to examine the wares of 390 German and 150 foreign exhibitors on a net area of 38,578m². The majority of the space was taken up by manufacturers of machinery and equipment used in the production, distribution and packaging of bread and bakers' confectionery. Alongside was 7,800m² devoted to the display of materials, 5,200m² to bakery-shop fittings and last but not least 2,750m² were taken up by a model bakery run by the Munich Bakers' Association which displayed an extremely appetising show of past and present bakers' craft.

Britain was well represented at the fair with a total number of 18 exhibitors, 15 of whom were on a joint venture covering 800m² under the auspices of the Process Plant Association and the British Overseas Trade Board. The joint-venture was visited on the opening day by Joseph Erthl, the Federal German Minister for Food, Agriculture and Forestry. The British group showed equipment for the preparation and cooking of bread and confectionery, including a working doughnut plant, together with pans, trays, washing and packaging machineries.

At the end of this long and strenuous exhibition the feeling among the British group was that this had been their most successful fair yet and that the main tasks now before them were going back home to follow up the large number of inquiries made and ensuring that they could produce the equipment for the orders taken.

With so many firms reporting outstanding success it is always difficult to pick out one or two examples, but it can be ungrudgingly claimed that the star of the joint venture was undoubtedly Tweedy of Burnley. The company's vacuum cooler for bread which is claimed to be unique in the world aroused great interest on the part of all the visitors and at the end of the fair Tweedy had taken orders for this equipment and its other range of products to the tune of £250,000 and was more than confident that the inquiries received at the fair would lead to follow-up business of at least £1 million.

Crypto Peerless was also elated at the end of the show, having taken orders for 61 machines and reporting 130 serious inquiries from 47 countries. Another more than satisfied exhibitor was Turbo Tools which received orders during the fair which would keep the firm busy for the rest of the year.

These are only typical examples of the feeling among the British contingent and this is borne out by the fact that all British exhibitors were adamant that they would take part in the next IBA to be held in Dusseldorf in three years time.

Purchase contact offices score at Sitev '77

From R. H. T. Bates, British consulate-general, Geneva

Twenty British companies took part in the fourth Sitev international exhibition for component suppliers to the vehicle industry at Geneva from 10 to 13 May in a joint venture sponsored by the Society of Motor Manufacturers and Traders and the British Overseas Trade Board. Several other British companies exhibited independently.

Five hundred companies from 20 countries, occupying a gross area of 14,000m² (6,500m² net), mainly from Europe but also from as far away as India, were attracted to this 'trade only' show. It also attracted 8,000 visitors, 80 per cent of whom, according to the organisers, were senior management personnel.

Major vehicle builders including Chrysler, Volkswagen, Audi NSU, BMW, Daimler-Benz, Berliet, Citroen, Renault, Fiat, Ferrari and Lancia occupied purchase contact offices, which were staffed both by purchasing officers and their senior management executives. This novel concept in exhibition organisation, introduced for the first time at Sitev '76 and much expanded this year, provided a unique opportunity for component manufacturers both to renew existing contacts and also to meet senior managers, with whom it would be very difficult to obtain an appointment in the normal course of business. In addition, purchase contact offices were also incorporated in the stands of several component suppliers.

The British joint venture exhibitors were all agreed that for them Sitev '77 had been a tremendous success. It had provided a unique meeting place for the European motor industry where they had all made excellent contacts. One company even went so far as to say on the afternoon of the first day that if it packed up and went home that evening the expense of participation would have already been justified. A company representative with 16 years experience of trade shows behind him voted it the most effective he had ever attended. No orders were reported by British firms, nor were they expected since original equipment contracts take many months of negotiation, but good inquiries were recorded by most companies and in all cases there was much opportunity for potential follow-up after the show.

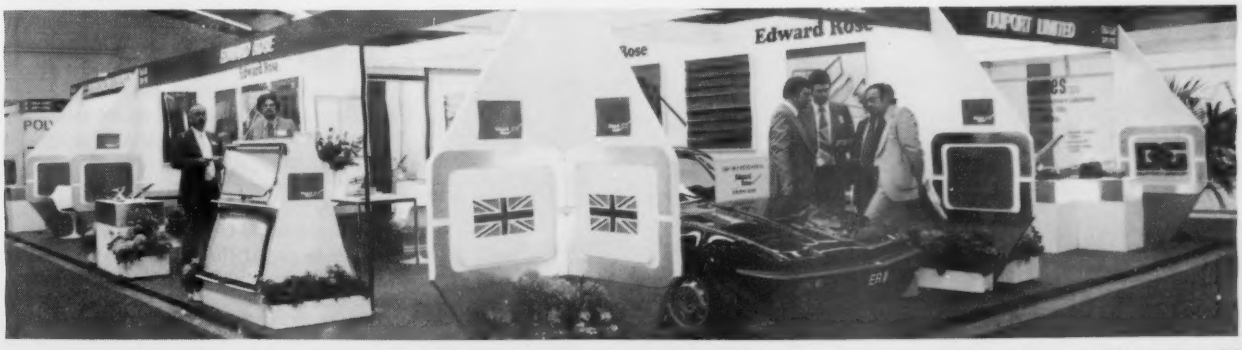
The next Sitev is scheduled for 23 to 26 May 1978, and the organisers have already announced that it will cover an area almost double this year's. Newcomers to Sitev, including companies from the United States, Canada and eastern Europe, have already entered into firm commitments, and, with most of this year's participants keen to return, space will be at a premium. One notable absentee this year, British Leyland, has apparently already signified its intention to organise a purchase contact office in 1978.

Publicity pays off at Compec

From M. W. Hewitt, British embassy, Brussels

Compec Europe '77, held at the Centre Rogier, Brussels, from 10 to 12 May, was devoted to exhibits of computer peripherals, small computers and systems. An extensive variety of equipment was on show, including main frames, entry and retrieval equipment, micro-fiche readers, display units, memory and data storage devices and disc cartridges and tapes. Ninety-eight exhibitors took part

The British joint venture at Sitev '77.



in a net area of 1,200m². There was a substantial British presence in the form of a joint venture of 27 companies sponsored by the London Chamber of Commerce and Industry and the British Overseas Trade Board.

The exhibition this year was considerably busier and livelier than last year and there is no doubt that the energetic publicity campaign conducted by the organisers, Iliffe Promotions Ltd, paid off.

The number of visitors was carefully recorded at 5,230, a striking increase of 31 per cent over that for Compec Europe '76. More importantly the British participants reported a high quality of visitor. Serious inquiries were received from many multi-national companies who have headquarters in Brussels and from the European commission.

Nearly all the British participants were very pleased with the exhibition. Wigmore Data's stand, in particular, was extremely busy and the company had an enormous amount of interest shown in its new data entry system which enables handwritten instructions to be entered directly into a computer. The Datapad system was adopted by Belgium's leading supermarket chain GB-Inno-BM shortly after Compec '76 and Compec Europe '77 enabled Wigmore Data to reinforce its success.

Micro Displays showed its range of microfiche readers and the firm is currently negotiating a big order for portable microfiche readers with the Belgian gendarmerie.

Vermont Research Ltd took large orders and is currently negotiating a substantial contract for rotating mass-memory, magnetic drum systems. Newbury Laboratories, through their Belgian agents, Eurotech (Belgium) SA, are currently negotiating an order for 600 Model 7001 visual display units. Several companies were able to sign up agency agreements not only for Belgium but for neighbouring countries. One company reported a queue of six Belgian firms anxious to act as agents.

To sum up, Compec Europe '77 enabled the British participants to consolidate and increase their share of the rich and expanding computer peripherals market in this heavily industrialised area of northern Europe.

UK machinery at knitting arts fair

From Roland Willcox, British consulate-general, Philadelphia

Six British firms took part in the fifty-third knitting arts exhibition (KAE) at Atlantic City in a joint venture sponsored by the British Textile Machinery Association and the British Overseas Trade Board.

The show which takes place every two years at Convention Hall, Atlantic City, New Jersey, was held from 1 to 5 May. It is sponsored jointly by the National Association of Hosiery Manufacturers, National Knitted Outerwear Association and National Knitwear Manufacturers Association.

Founded in 1906, KAE is a historical showcase for new products and processes, and is claimed to be the longest-running textile show in the world and the only integrated knitting one anywhere under one roof covering all processes before and after knitting. The show provides a wide spectrum of industry activity concentrating on the knitting arts from basic fibres and yarns through the most versatile and intricate production equipment much of which includes the latest computer-controlled techniques.

Despite a slow period in the textile industry which has lasted several years, this year shows a definite upturn and orders rather than mere exposure have once again become a significant aspect of the knitting arts exhibition. Orders from Latin American buyers who traditionally visit this show were very much in evidence, despite a smaller attendance this year by both American and overseas buyers who numbered approximately 17,500.

Significant business was obtained by several of the members of the British joint venture in both immediate and potential sales.

Detexomat Machinery Ltd, High Wycombe could have sold their new Speedomatic-HS hosiery toe-closing machine several times over off their stand.

Alan Shelton Ltd (Leicester) exhibiting three lines of creels and tensioners gained valuable exposure and inquiries from would-be distributors.

Camber International Ltd of Leicester showed the Twinit single jersey weft knitting machines, Velnit Plus for medium and fine-gauge plush fabric, and Fleecenit a three-yarn multifeed fleece machine.

Stibbe (Burtotex) Ltd of Leicester and Burton Textiles Ltd of Burton on Trent exhibited together and showed the new SB range of knitters together with Burton Textiles T30 EB warping machine and warp knitting machine accessories.

The Bentley Engineering Group occupied a large island in the centre of the main hall manned by a staff of 30 people. The quality, reputation and regular attendance at this show made this firm one of, if not the, busiest at the exhibition. On show were the products of Wildt Mellor Bromley, Samuel Pegg and Sons Ltd. Bentley, William Cotton Ltd and T. Grieve and Co Ltd, and included knitwear and jersey wear machines, footwear and flat knitters, full-fashion knitters, dyeing and finishing equipment, needles and components.

Knitting industry sources predict a modest upward trend in production over the next 25 years, with a hoped-for 150 per cent increase over 1976 levels in double and single knits. Large diversified companies would produce about 30 per cent of all knit fabric by 1985 and perhaps as much as 60 per cent by the end of the century. Major technological breakthroughs are expected in new types of yarns, loop-forming systems, faster machinery, electronic equipment innovations, full garment knitting, molded garments, self-texturing yarns, knitting directly from fibres, finish-free knitted goods and waterless dyeing. Nylon filament and rayon-acetate triacetate yarns will experience little growth whereas polyester filament yarns are expected to double by the year 2000.

Imports into the United States are expected to loom larger at the same time as present excess capacity and lack of sufficient investment capital problems ease in the $7 billion knitting industry.

UK pet firms in force in Paris

Peter Kemp, managing director of Shaws Veterinary Chemists Ltd (left), demonstrating his company's latest model of carrier for all sorts of pets at this year's Animark exhibition held in Paris from 7 to 9 May. No fewer than 32 British manufacturers of pet and aquarium products took part with the backing of the British Overseas Trade Board.

THE

KOREA TRADE CENTRE

will move to new premises at

16/21 SACKVILLE STREET,
LONDON W1X 2PR
Telephone 01-439 0501
Telex 22375 KOTRA G

on MAY 28th, 1977

Please address all correspondence to the new premises from this date.

We also take this opportunity to ask you to visit our

KOREAN PRODUCTS SHOW

Glasgow - Central Hotel
(Carradale Room)
June 23, 24, 1977

Manchester - Midland Hotel
(Lancaster Room)
June 27, 28, 1977

Various Korean manufacturers will participate, with all kinds of consumer products (textiles, garments, electrical goods, stainless wares, etc.) as well as plywood, fishing and sports nets and other goods.

Queries: **KOREA TRADE CENTRE**
16/21 Sackville Street,
London W1X 2PR
Telephone 01-439 0501

UK hospital equipment excites Europe's interest

From L. W. Zonneveld, British embassy, The Hague

British exhibitors at Medica '77, the international exhibition for hospitals and nursing establishments, held in Utrecht from 3 to 7 May, were more than satisfied with the results. This year the Royal Netherlands industries fair allocated the Bernhard and Marijke halls covering an area of 18,000m², an increase of 2,000m² on Medica '75.

Of the total of 889 companies exhibiting at Medica, the majority were Dutch and German but, apart from the joint venture, 84 British firms were represented. The products and services displayed ranged from business machines used for hospital administration to hand-held surgical instruments.

Two specific sectors were of note: medical disposables, a growth area in the surgical and nursing fields; and physiotherapy and rehabilitation apparatus and equipment. The Congress of Physiotherapy was timed to coincide with Medica '77 and took place from 7 to 8 May.

The joint venture included 17 firms showing a range of products for the health-care market varying from industrial cleaning machinery to muscle stimulation units. An information stand was manned by the British Health-Care Export Council. The British joint venture was the largest ever at this event. While the majority of the exhibitors were well-known in the medical field and established exporters, it was encouraging to see two or three firms new to exporting, receiving a considerable number of inquiries from interested Dutch importers and distributors.

A British firm making automatic uniform dispensers did extremely well and sold about nine units. Considerable interest was shown in a low-loss air bed and also in a newly-developed water bed on show. The water-bed manufacturer is talking to several Dutch firms who would like the exclusive agency. The air beds stand attracted considerable attention. A large number of visitors to the British stands who came from France and Germany showed a lot of interest as did the physiotherapists attending the congress.

Two stands emphasising the needs for adaptions for the handicapped also attracted much interest. There were displays by the Netherlands Foundation for the Handicapped and the British Department of Health and Social Security which included books and publications by Mary Marlborough Lodge of the Nuffield Orthopaedic Centre and techniques and photographs shown by the London Hospital.

The joint venture was considered most successful by the British group. Some of the participants received many inquiries which may result in valuable orders in the near future. This important international medical fair and the joint venture appearance demonstrated once again the considerable interest which European companies show in British hospital equipment. The skill of British instrument and equipment manufacturers so clearly staged at this event attracted the attention of the national and international visitors and proves the importance of a close and continuing interest in developments in the Dutch and overseas markets.

Housing: an urgent problem in Iran

From Roy Carter, British embassy, Tehran

Dr Manouchehr Taslimi, the Iranian Minister of Commerce opened the Tehran construction fair on 29 April.

British exhibitors expressed themselves well satisfied with their participation.

Although down in terms of quantity (50 British exhibitors took part in the last construction fair held in the 'gold rush' days of 1975 compared with 16 in Construction 77), the quality of the exhibits was high

The British pavilion, which was a joint venture with the Building Materials Export Group, was much admired. All the firms taking part displayed products relevant to Iran's current building boom which embraces buildings in almost all shapes and forms: roads, ports, dams, universities, hotels, offices, houses and so on. But the Iranian official interest at Construction '77 focussed very clearly on housing, an urgent social problem in Iran.

Eyecatching UK exhibits at Piacenza

From British consulate-general, Milan

A British joint venture group of eight firms, sponsored by the British Button Manufacturers' Association, exhibited a wide range of buttons, buckles, clasps, slides, blanks and dress accessories at the sixth international button fair, SIBA, Piacenza.

This is a highly specialised event; the only other comparable shows in Europe are those at Paris and Nuremberg. As such, it is an invaluable place for British manufacturers to meet buyers from all over the world. This joint venture is held biennially and it was encouraging to see three extra UK participants compared with 1975.

The British firms were uniformly pleased with the fair and, apart from establishing new contacts, some significant third-country orders were taken. The British contingent was by far the largest among the foreign exhibitors and their colourful stands, and well-presented and eye-catching exhibits, contributed towards making this another successful enterprise.

First British pavilion at Strasbourg fair

From the commercial section, British consulate-general, Strasbourg

For the first time at the Strasbourg spring fair, which opened its doors from 30 April to 8 May, the people of Alsace were able to visit a British pavilion.

This British participation was the brainchild of Jacques Aubrée de Labellière, a Frenchman who has lived for 11 years in England, and who is now Director of Trade and Tourist Marketing Services (TTMS) of Westbury, Wiltshire. After a much smaller venture in Metz last year, Mr Aubrée was convinced that the products of a number of small and medium-sized British companies could appeal to the French market. As a result, the products of 25 firms, ranging from dolls, pyjama cases and tea to lawn-mowers and garden furniture, were on display, many of them for the first time in France.

Though many of the thousands of visitors came only to look – and to take away a large amount of tourist literature supplied by the British Tourist Authority and Dan-Air (who have just opened a regular air service between Gatwick and Strasbourg) – others also stayed to buy. In addition to the public interest a number of the exhibitors also managed to contact agents and distributors, and some agreements are in project.

Interzum: best for years

From the commercial department, British embassy, Bonn

Cologne was the venue for the international accessory, equipment and material fair for furniture production, interior decoration and furnishings and machines for the upholstery industry – Interzum – which took place from 14 to 17 May for the tenth time. This event, probably the most important of its kind in the world, takes place every two years.

The fair covered a net area of 37,963m² plus 1,375m² occupied by special exhibits such as 'floor-wall-ceiling', 'good products properly applied', 'the carpenter as supplier to the industry'.

Twenty-two British manufacturers of a wide range of products for the furniture industry and interior decoration including upholstery machinery, wooden and plastic veneers, beltings, fittings and castors, fabrics and carpetings participated in this fair on a joint-venture stand under the auspices of the British Overseas Trade Board, sponsored by the Birmingham Chamber of Commerce.

With the exception of one or two firms, the UK exhibitors were highly delighted with results achieved during the fair. From the very beginning British firms were extremely busy dealing with buyers from many countries who showed a keen interest in the ranges on display. There was a high standard of buyers' and most of the inquiries were of a serious nature.

Not only the British but also other exhibitors (almost 800 from 35 countries) described the fair as the best one for years. The number of visitors went up by about 15 per cent and totalled 33,000 of which 8,200 came from 62 foreign countries.

Interzum cannot really be described as an ordering fair. Visitors came to obtain information on latest technical developments, technology and innovations, and to make contact with existing and new suppliers. However, orders placed after the event are expected to be of considerable volume.

Overseas trade export services

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Pilot Survey aids UK-Japan exports

David Wilson and Partners of Cambridge, is offering Pilot Survey, a new service to British companies exporting or intending to export to Japan.

The Pilot Survey was designed, the company says, to give a quantifiable market response for British products and services, by providing detailed press reaction, statistics, financial and legal data, and status reports on responding Japanese companies and institutions.

David Wilson and Partners will handle any British product or service for which profitable sales can be expected in Japan – which is one of the world's most dynamic exporters but which has only recently opened its doors to imports in any quantity.

The company's new Pilot Survey makes extensive use of promotion through the media, backed by selective direct mail. It presents clients with press cuttings, market data and profiles of the responding companies and institutions, upon which clients can then base future marketing policies.

David Wilson and Partners will also help clients by providing translation and printing services, buyer research surveys, agency selection and policing, solo exhibitions and short courses in basic Japanese for personnel visiting Japan.

Further information: circle 379

'Fact Finder' issued by Meadows

Information and advice on export documentation requirements for shipments to Europe and Scandinavia are contained in a new-style 'Fact Finder' brochure published by international freight forwarders Thomas Meadows and Co.

In addition to information on Meadows' services to Europe and Scandinavia, the brochure covers such topics as the correct preparation of EUR 1 and transit forms, movement certificates and declarations of origin. There are also background notes on groupage and full load operations; hazardous goods movement; export packing; marine insurance and the selection and use of air-freight services.

Scheduled as a quarterly publication, the two-colour 'Fact Finder' may also be used as a handy wall-chart guide to the 40-plus European and Scandinavian destinations served by Meadows' scheduled TIR trailer, container and ferry wagon groupage services.

The services are independently available direct from each of four main UK regions, and the brochure's tabular section includes a detailed guide to rate structures applicable from Meadows' individual branches throughout the UK.

Further information: circle 380

Ferrymasters order trailers for ME services

Ferrymasters Middle East, part of P&O Unit Loads, has placed orders totalling £600,000 for a range of new trailers.

Included in the order are 12m Tidd supervans; 12m flat platforms from Trailor; and 12m standard tilt-trailers from Cravens Homalloy.

Ferrymasters Middle East provide regular haulage services trans-Europe to the Mediterranean ro-ro ports of Marseilles and Venice, then by ferry to Aqaba in Jordan and shortly to Jeddah in Saudi Arabia.

Key destinations served by Ferrymasters Middle East include Iran, Iraq, Jordan, Kuwait, Lebanon, Qatar, Saudi Arabia, Syria and the UAE.

Route proving started early in 1976, operating direct overland, and services were extended earlier this year to include combined overland roll-on roll-off ferry services.

Further information: circle 381

Ford switches to containers

Ford's completely knocked-down (CKD) cars being stowed at Dagenham into a Harrison Line 40 ft container which will be shipped out of Tilbury on the *Caribia Express* for Trinidad where the cars are assembled. For many years the Ford Motor Co have used the Harrison Line conventional service to the West Indies for CKD vehicle consignments. But with the introduction of the Carol container service to the West Indies, Ford switched from conventional to container shipments.
Further information: circle 382

News of services for exporters

If your company has recently introduced a new service for exporters – in, for example, the packing, forwarding, shipping, airfreighting, banking or translation fields – we would be glad to have details, plus a good black and white photograph where appropriate.

Items for inclusion in our fortnightly 'Export Services' feature should be addressed to the Overseas Editor, 'Trade and Industry', Room 439, 1 Victoria Street, London SW1.

Advertisers who wish to be associated with this feature should contact Mike White at T. G. Scott's on 01-242 6264.

P&O Strath Services expand Middle East operations

In June P&O Strath Services are starting a container service to Jeddah and Aqaba expanding their cargo operations from the UK and northern Europe to the Middle East.

Sailings will be maintained on an 18-day frequency from Rotterdam, Bremerhaven and Tilbury by two 19-knot ships capable of carrying 310 20-ft containers.

The inaugural voyage will leave Rotterdam on 27 June, Bremerhaven on 29 June and Tilbury on 1 July. Transit time to Jeddah will be 10 days and to Aqaba 14 days.

A full haulage service is offered throughout the UK and the north continent to inland trading centres in Jordan and Saudi Arabia. Transport within Saudi Arabia will be undertaken by the P&O-managed Saudi National Transport Co, which has a fleet of 26 tractors and over 50 trailers based in Jeddah.

The new service, designed for full- and part-container loads to Aqaba and full-container loads only to Jeddah, will augment and extend P&O Strath Services established conventional cargo services to the Red Sea region.

Container bookings and all documentation will be carried out by Eastern Liner Services, P&O Strath Services' UK brokers.

Further information: circle 383

Boost for direct dialling . . .

British phone users can dial direct to four more countries, bringing to 54 the total number of nations connected to Britain by international direct dialling (IDD). The latest countries available are Bermuda, the Cayman Islands, Hungary and Swaziland.

In addition, the direct-dialling link to the US has been extended to include Hawaii. This means that phones in 49 American states – all but Alaska – can be called directly from Britain.

With these further extensions, people with the IDD facility in the UK now have direct access to nearly 325 million phones throughout the world – about 80 per cent of the global total.

Further information: circle 384

. . . and autotelex to Malta starts

An automatic telex service between Britain and Malta has brought to 107 the number of countries which UK telex users can contact direct.

Around 8,000 calls a month are made through the operator to Malta. Major users include the textile, machinery and transport equipment industries, as well as invisible export interests.

About half of Malta's telex numbers – all those beginning with '4' and some of those starting with '2' and '3' – have gone automatic. The rest will continue to be available through the operator using the code 2000.

Cost of an autotelex call to Malta is 2.5p for six seconds – 25p a minute. The cost of an operator-connected call is being cut at the same time from £1.05 for a three-minute minimum with 35p for each additional minute to 75p plus 25p respectively. These charges are subject to VAT.

Further information: circle 385

Involvement Packing offers free services

Involvement Packing, Kineton, Warks, is offering to help exporters with the following free services: quotations on export packing costs; advice on pack design; advice on shipping costs and methods; advice on documentation requirements.

These services, the company says, are designed especially to aid the small- or medium-sized company exporting for the first time or wishing to expand into new markets.

Involvement Packing has found that exporters often guess packing and shipping costs when preparing quotations. Guessing, Involvement Packing says, can have two undesirable results: either the guess is too low and the exporter loses money when he gets the order or the guess is too high and the exporter loses the order.

By consulting Involvement Packing at an early stage in tendering, exporters can avoid these problems.

Further information: circle 386

Alltransport increases Eire services

Fast surface groupage freight services to Eire started by Alltransport International Group's forwarding division out of Unitair Centre, by Heathrow Airport, have, the company says, proved so successful they have now been built up to three departures a week out of the west London depot with the introduction of a new weekend service.

The groupage services employ 12m trailers using British Rail's Fishguard-Rosslare ro/ro services and give delivery times in Eire of between 36 and 48 hours.

Midweek services leave the Unitair Centre on Mondays and Wednesdays for delivery in Eire on Tuesday and Thursday afternoon respectively.

The new weekend service leaves Friday for delivery on the following Monday morning. Distribution in Eire is handled through Alltransport's Dublin depot.

Further information: circle 387

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

New foreign language fast-print service

Bruce Willmott Publicity, Forest Row, Sussex, has just introduced a foreign language fast-print service for exporters who need their overseas literature in a variety of languages.

Bruce Willmott, the company's proprietor, says that even if the initial contact could read and speak English, it did not follow that the end user could, so all literature which is associated with exported goods or services should also be translated.

Bruce Willmott says the company's service went further than just a translation of exporters' copy. It may be necessary, indeed essential, to re-write copy so when it was translated it means what was intended.

Further information: circle 388

Keyways opens Tehran link

Keyways, part of EWL, the transport department of Ellerman Lines, has started a new container groupage system to Tehran.

The first sailing was scheduled for 20 May and the frequency thereafter is every eight days. The routing is by Ellerman City Liners to the port of Iskenderun and then overland direct to the customs terminal at Tehran. An Ellerman manager has been resident in Tehran for some time for the purpose of providing liaison between the Iranian and UK ends of the operation.

The Keyways rate structure is strictly all-inclusive on a weight or measurement basis, from any of eight designated UK reception terminals. Keyways says there are no documentation charges or add-ons in the shape of congestion surcharges or transit taxes. Keyways offers depot-to-depot rates and whether from Scotland or the south of England the rates are the same.

Cargo received in London, Stoke-on-Trent and Leicester will be consolidated at the Midlands terminal in Warley near Birmingham, and cargo received in Glasgow, Hull and Leeds will be consolidated in Manchester. The two final departure points will, therefore, be Warley and Manchester from where the containers will be transported to Ellesmere Port for shipment.

Further information: circle 389

New trailer services from Lep

Lep Transport Bradford has introduced two additional groupage/full load trailer services for manufacturers and exporters in Yorkshire.

The first is direct to Cologne and Frankfurt leaving each Thursday from Lep's Buck Street Depot, Bradford. Transit time is three days to Cologne, four days to Frankfurt.

The second also leaving on Thursdays is the weekly direct groupage/full load trailer service Lep Bradford offers to Paris, operated in conjunction with Paris agents, EGT.

Further information: circle 390

Overseas trade country data

Australia

Footwear, textiles and apparel quotas. In a joint ministerial statement on 29 April, it was announced that the government had decided to extend the validity period of quota allocations for a period of six months in respect of textiles and apparel to 31 August 1978 and for footwear to 30 June 1978, in view of a heavy decline in employment levels in these industries since early 1974. The Industries Assistance Commission was asked to advise by 31 May 1977 on the supplementary levels of quotas to apply during the additional six-months period. Details of the supplementary allocations would be advised to individual importers in good time for them to operate during that six-months period but no later than mid-July 1977.

The ministers said that importers should bear clearly in mind that if the existing employment and market trends continue it would be necessary for the government to allocate quotas for the additional six-months period at an annual rate lower than that currently operating in the 1977/78 quota year, in order to provide an acceptable level of employment and activity.

Further details will be published as soon as available.

Inquiries: CRE 01-215 5319.

Ref: CRE 672/77, 673/77, 674/77, 675/77, 676/77.

Controls on overseas borrowings by financial intermediaries. The Australian Treasurer announced on 5 May that a variation was being made in the application of the controls on overseas borrowings, in the light of the experience of the last three months.

With immediate effect, approved borrowings for certain categories of investment in mining and manufacturing industries would also be exempt from the VDR in those cases where the funds were borrowed overseas by an Australian financial intermediary and on-lent directly to the end user.

Copies of the Treasurer's statement are available from CRE, Room 336, 1 Victoria Street, London SW1H 0ET.

Inquiries: CRE 01-215 5318. Ref: CRE 36473.

Inquiry into the fish harvesting and processing industry: draft report. A notice in *Trade and Industry*, 4 February, reported that the Industries Assistance Commission had been asked to inquire into and report on the question as to whether assistance should be given to the Australian industries engaged in the harvesting and processing of fish. The commission has now issued a draft report to give interested parties an opportunity to examine and comment on it before final recommendations are made. In order to receive submissions on the draft the commission will hold further hearings at the following places and times:

Adelaide: Commercial Tribunal, 10th Floor, East Wing, GRE Building, 50 Grenfell Street, Adelaide, commencing 10am, 30 May 1977

Perth: Conference Room, Confederation of Western Australian Industry (Inc), 1st Floor, 188 Adelaide Terrace, commencing 10am, 1 June 1977

Perth: Bankruptcy Court, 8th Floor, Lombard House, 251 Adelaide Terrace, commencing 10am, 2 June 1977

Brisbane: Conference Room, Lower Ground Floor, Australian Government Centre, 295 Ann Street, commencing 10am, 20 June 1977

Barton ACT: Public Inquiry Room, Industries Assistance Commission, Kings Avenue, commencing 10am, 27 June 1977

Inquiries: CRE 01-215 5319. Ref: CRE 1556/75.

Short-term assistance: room air conditioners. A notice in *Trade and Industry*, 14 January, reported that the Industries Assistance Commission had released a draft report of its inquiry into the question as to whether assistance should be given to the production in Australia of air-conditioning machines (tariff item 84.12) and other domestic electrical appliances. Although the final report has not yet been released the commission held at very short notice an additional public hearing in Canberra on 9 May on the question of short-term assistance for room air conditioners.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Export (CRE) Division, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

A further notice will be published as soon as the recommendations of this inquiry are issued.

Inquiries: CRE 01-215 5319. Ref: CRE 4/75

Changes in import duty. The following tariff reductions were effective from 4 May. They are an extension of the Australian government's policy of reducing tariff levels where there is no adverse effect on local industry. These changes were previously withheld pending international consultation.

CCCN no.	Description	General rate	Preference rate
1	Omit sub-item 17.02.1, substitute the following sub-item:		
17.02.1	Lactose; lactose syrups	20%	9%
2	Omit sub-item 19.08.9, substitute the following sub-item:		
19.08.9	Other	12%	9%
3	Omit paragraph 21.05.19, substitute the following paragraph:		
21.05.19	Other	$0.065 per kg	$0.032 per kg
4	Omit item 25.08, substitute the following item:		
25.08	Chalk	12%	9%
5	Omit sub-item 35.01.1, substitute the following sub-item:		
35.01.1	Casein; ammonium caseinate; sodium caseinate; casein glues	15%	13%
6	Omit item 36.08, substitute the following item:		
36.08	Other combustible preparations and products	15%	7.5%
7	Omit sub-items 40.06.6 and 40.06.7, substitute the following sub-items:		
40.06.6	Goods of latex produced by polymerisation of butadiene or copolymerisation of butadiene or other materials, not being goods falling within a preceding sub-item of this item	19%	19%
40.06.7	Goods of synthetic rubber, as follows: a of polybutadiene; b of polybutadiene-styrene; c of polybutadiene and polybutadiene-styrene not being goods falling within a preceding sub-item of this item	37.5%	37.5%

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Belgium

Imports of fish and shellfish from UK. The Belgian authorities have issued a decree which requires imports of fish and shellfish into Belgium and destined for human consumption to be accompanied by health certificates. The original decree was published on 26 May 1976 and an amended version on 29 December. At the request of the UK authorities the date of implementation was deferred so that consultation could take place on certification procedures. The date of implementation of the requirement will now be 1 June 1977 in respect of exports from the UK, the Channel Islands and the Isle of Man.

There is one type of certificate for either fresh, chilled or frozen fish. The health certificates will, in England and Wales, be certified by environmental health officers of coastal district councils and/or port health officers of port health authorities.

Exporters of fish are advised to contact their local environmental health or port health departments to register that they will require assistance, and to obtain details of the procedures to be followed.

Inquiries: Fisheries Department, Room 259, Ministry of Agriculture, Fisheries and Food, Great Westminster House, Horseferry Road, London SW1P 2AE, tel. 01-216 7523.

CRE tel. Direct dialling **OTAR** telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Canada

Investigation into imports of footwear. *Trade and Industry*, 22 April, reported that the Canadian Anti-Dumping Tribunal would be holding public hearings in relation to the inquiry into imports of footwear in Canada.

The tribunal has announced the following timetable of hearings:

16 to 20 May at the Ritz-Carlton, Montreal
30 May to 3 June at the Park Plaza Hotel, Toronto

If necessary, further hearings will be held in Ottawa commencing 6 June in the tribunal's hearing room at Place Bell Canada.

Inquiries: CRE 01-215 5397.

Countervailing duty regulations. The Canadian Ministers of Finance and National Revenue announced on 6 April the promulgation of countervailing duty regulations under section 7(4) of the Canadian customs tariff. The regulations were published in the *Canada Gazette*, Part II of 13 April 1977.

Inquiries: CRE 01-215 5397.

Chile

Import duty amendments. The Chilean *Diario Oficial*, 2 May, published Ministry of Finance decree 353 listing new custom duties (*ad valorem* on the cif value) on all commodities. Tariffs affecting finished consumer goods and consumer durable items have, for the most part, benefited with an average reduction of five points from the duties in force since January 1977. On the other hand duties on some capital goods, spares and accessories thereof, have been increased by amounts varying between 5-10 points.

British firms, particularly those negotiating supplies to Chilean customers, are advised to re-confirm their information on this subject. Inquiries, specifying the products in which they are interested, should be addressed to OTAR 01-248 5757 ext. 474/476.

France

Cosmetics. A new decree laying down labelling requirements for cosmetics and toilet preparations was published in the *Journal Officiel* of 5 May 1977.

Copies of the French text are available and a translation is being prepared.

Inquiries: OTAR 01-248 5757 ext. 423.

Federal Republic of Germany

Approval for motor vehicle types. The Federal Office for Motoring has issued a general letter detailing a system of approval for motor vehicle types and general operating approval for motor vehicles including a system of recognised vehicle agents to work the system.

An unofficial translation is available from OTAR 01-248 5757 ext. 288/466.

Republic of Ireland

Special charges on confectionery. The special charges imposed by the Republic of Ireland on imports of tariff headings 17.04D, 18.06B, 18.06C, 19.08B and 21.07C originating in the UK (*Trade and Industry*, 6 May) are to be removed on 4 July when these items originating in all EEC member states will be subject to monetary compensatory amounts. The mcas established by commission regulation EEC/800/77 which appeared in the *Official Journal* L97, 21 April, also apply to a number of other processed agricultural products.

Mcas will be applied until 21 December 1977 on those goods previously subjected to the Irish additional charges.

It is understood that meanwhile the Republic of Ireland will, for these products, continue to operate on a national basis the arrangements (applied since the beginning of April) whereby an amount equivalent to the difference between the UK and Irish mcas (had they been in force) is charged on imports into Ireland of products of UK origin and granted on products of Irish origin exported to the UK.

Inquiries: OTAR 01-248 5757 ext. 466/467/288 (Irish Republic) and 7174 (EEC agricultural products).

Iran

Import regulations and duties. Further to the notice in *Trade and Industry*, 13 April 1977, regarding import duties, taxes and regulations for 1977/78, details of the English translation of the Iranian tariff and import regulations for the Iranian year 2536 (21 March 1977 to 20 March 1978) are now available.

Inquiries from British exporters, which should specify the item(s) or preferably the CCCN number(s) to OTAR 01-248 5757 ext. 475/420/7062.

Italy

Vehicle construction regulations. A supplement to the *Gazzetta Ufficiale*, 28 March, published eight ministerial decrees, dated 24 January, in implementation of EEC directives 756-62 of 1976, and of directives 220/70, 290/74 and 102/77, on the following subjects:

1 the installation of lighting and light-signalling devices
2 reflex reflecting devices
3 side lights, rear lights and stop lights
4 direction indication lamps
5 rear registration plate lights
6 headlights
7 front fog lights and lamps
8 atmospheric pollution by motor vehicles with spark ignition engines.

A copy, in Italian, of the supplement, can be seen in Room E19, Export House, 50 Ludgate Hill, London EC4M 7HU.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Lebanon

Import licensing amendments. The Lebanese authorities have announced that the items shown below are no longer subject to licensing restriction by the Ministry of Economy and Commerce:

CCCN	Description
20.03, 20.04, 20.06	Preserved apples falling within these headings
29.14	Acetic acid and its anhydrides
70.04 A and B, 70.05 A and B, 70.06, 70.07 A	Plate glass
76.02, 76.06, 76.08	Aluminium pipes, tubes, rods and structural parts
94.03 B	Parts of wooden furniture
96.02	Brushes of all kinds

Licensing restrictions have also been waived on the import of cement and sugar. When details of these items are available another notice will be issued.

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Malta

Import licensing. The Malta *Government Gazette*, 3 May, with legal notice 58 of 1977 published the following items which have been added to the list of goods requiring an import licence:

Floor brooms, mops, squeegees, hand brooms, scrubbing brushes, drinking straws refuse-collection vehicles and leather outerwear.

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Netherlands

Sugar. A decree dated 6 April 1977, ('Staatsblad' 247), published on 10 May, and effective from 12 May lays down net weights at which sugar shall be offered for sale when individually packed.

Copies of this decree (in Dutch) are available from OTAR 01-248 5757 ext. 288/466/467.

Singapore

Tariff amendments on articles of clothing. The Singapore government has introduced the Customs Duties (Amendment No. 4) Order 1977 which came into effect on 29 April 1977 whereby customs duties are amended as follows:

CCCN (formerly BTN)	Description	Unit of quantity	Customs full	Duty preferential	Excise
a by inserting immediately after the heading 39.07.510 the following sub-heading:					
510-1	Plastic appliques	Dozen	Nil	Nil	Nil
b by deleting the heading 60.50.000 and substituting the following:					
60.05	Outer garments and other articles, knitted or crocheted, not elastic nor rubberised:				
100	Outer garments and other articles	Dozen	15%	15%	Nil
200	Parts of garments knitted or crocheted directly to shape acceptable to the Comptroller	Dozen	Nil	Nil	Nil
900	Other	Dozen	15%	15%	Nil

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Spain

Home compensation tax on sodium carbonate. The Spanish *State Gazette*, 14 May, published royal decree 1049/1977 reducing temporarily to 1.5 per cent the home compensation tax to be paid on the importation of sodium carbonate, tariff heading 28.42.C. The reduction is for a period from 2 May to 1 June 1977.

Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

Gambling equipment. The Spanish *State Gazette*, 12 May, published royal decree 1026/1977 of the Ministry of Commerce establishing rules for foreign investment in companies dedicated to gambling:

1 Investment will have to be approved by the Spanish authorities in all cases.
2 Investment will never be more than 25 per cent of the capital of the company.
3 Spanish companies with foreign capital will not be authorised to make payments abroad in respect of technical assistance or royalties, although payments abroad could be authorised for services duly contracted and justified to the Spanish authorities.

The decree came into force on 13 May 1977.
Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

Modifications to home compensation tax. The Spanish *State Gazette*, 6 May, published royal decree 927/1977 of 11 March modifying the home compensation tax levy as follows:

CCCN	Description	Home compensation tax
ex 22.01 A	Mineral waters and aerated waters, bottled for retail sale, in disposable containers, with a capacity of not more than 2 litres	9%
29.19 C	Tributyl phosphate, triphenyl phosphate, tricresyl phosphate, trixyly phosphate and trichloroethyl phosphate	12%
73.02 A.2	Other ferro-manganese ferro alloys	11.5%
84.35 C.4	Rotary offset printing machines	12%

These modifications are valid from 9 May 1977.
Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

CRE tel. Direct dialling **OTAR** telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Trinidad and Tobago

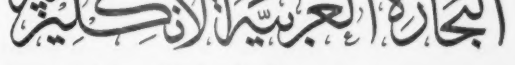
Tendering procedure. It is a legal requirement that all work and contracts to be paid for by the Trinidad and Tobago government have to be placed for public tender through the Central Tenders Board, by advertisement in the local press and the Official Trinidad and Tobago *Gazette*. Exempted from this procedure are:

1 Trinidad and Tobago Electricity Commission, 63 Frederick Street, Port of Spain;
2 Trinidad and Tobago Telephone Company, 54 Frederick Street, Port of Spain;
3 Iron and Steel Company of Trinidad and Tobago, 28/30 Sackville Street, Port of Spain;
4 Point Lisas Industrial Port Development Corporation, 3rd Floor, Furness Withy Building, 90 Independence Square, Port of Spain;
5 Aluminium Smelter Project, c/o Co-ordinating Task Force, St Ann's Avenue, St Ann's, Port of Spain;
6 Drugs and Hospital Supplies Tenders Committee, Long Circular Road, St James, Port of Spain.

These organisations put their requirements to open advertised tender, although they sometimes use a pre-selective system, with the names of firms supplied by their consultants. For large projects, the Central Tenders Board can request tenders on a pre-selective basis providing the Minister of Finance has given his specific approval. In the case of items of relatively small value the Central Tenders Board uses a register of suppliers of articles and contractors for miscellaneous services, which is constantly revised. Each year it invites local manufacturers and sole agents/authorised distributors to submit details of the articles and the services they can provide. In this connection the director of the Trinidad and Tobago Central Tenders Board has recently issued this year's invitation to apply for inclusion in the register. The opening of tenders is not done publicly except where international funds are involved. When contracts are awarded, details are published in the official Trinidad and Tobago *Gazette*.

British firms are advised that they stand more chance of being invited to tender when selective bids are sought if they have a local agent. Further information may be obtained from the Central Tenders Board, 48/50 Sackville Street (upstairs), Port of Spain, Trinidad WI, tel. 62-54568.

Continued on page 406.



Do *you* understand this? No?

But this is the language of your customers in the Arab-speaking countries of the Middle East. Pay them the compliment and essential courtesy of addressing them in their own language. Use our well-established journal *in Arabic* to develop the great potential for your exports to the Middle East.

Use 'ANGLO-ARAB TRADE', the only journal *exclusively* promoting *British* technical and commercial interests and the development of *British* exports to the Arabic-speaking countries.

All enquiries resulting from your advertisement translated free of charge. Advertisement rates include translation into Arabic.

'ANGLO-ARAB TRADE' in *Arabic*, established 1947.

Send for a specimen copy to:

British Industrial Publicity Overseas Ltd.,
Walter House, Bedford Street,
London WC2R 0QB

Telephone: 01-836 9058/9/0 and 3685.

ENCIRCLE TI 498 ON PAGE 419 FOR FURTHER INFORMATION

Consultants. Consultants wishing to be considered for appointment in connection with any government project are invited to register with the Central Tenders Board, 48-50 Sackville Street (upstairs), Port of Spain, Trinidad, WI. Nevertheless the Central Tenders Board will not be obliged to invite any registered consultant or consultants to submit proposals on any project that the board is satisfied requires special expertise and experience which they do not possess; in such cases the board may make a public or private invitation for proposals on a project from any consultant.

When appointing consultants the board will give preference to those who are citizens or residents of Trinidad and Tobago.

Inquiries: OTAR 01-248 5757 ext. 7016.

United States

Imports of speciality steels under quota. Further to the notice which appeared in *Trade and Industry*, 20 May, the following table, derived from statistics made available by the US Customs Service, shows the products which are subject to quotas, the US quotas on imports from the EEC for the 12 months 14 June 1976 to 13 June 1977, and US imports of the products concerned from the EEC during this period, as at 13 May 1977.

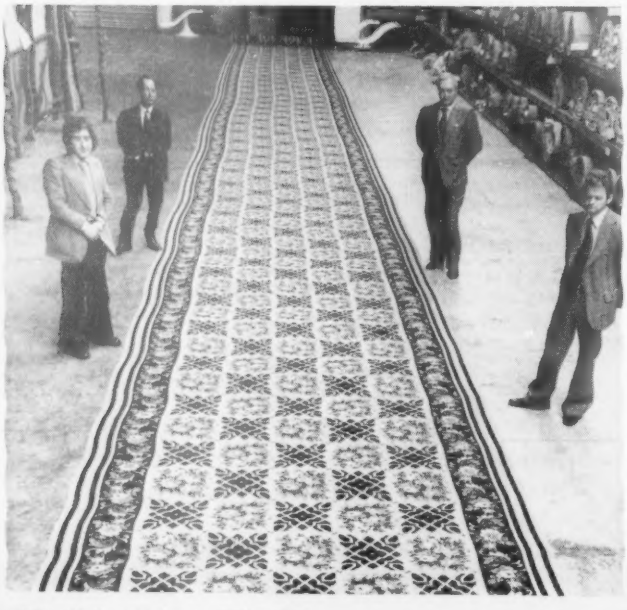
Pounds weight

Product	US import quotas for 12 months 14 June 1976 to 13 June 1977	US imports during this period as at 13 May 1977
Sheet and strips of stainless steel (item 923.20)	34,082,000	30,653,173
Plates of stainless steel (item 923.21)	9,600,000	6,167,394
Bars of stainless steel (item 923.22)	4,200,000	2,129,476
Wire rods of stainless steel (item 923.23)	*14,800,000*	*Quota filled*
Bearing steel (item 923.25)	7,000,000	3,006,805
Alloy tool steel (item 923.26)	6,800,000	Quota filled

Inquiries: CRE 01-215 5629.

Largest carpet by British firm for US hotel

This carpet – 109 ft long and 9 ft wide – is the largest ever made by *the British firm of Louis de Poortere (England) Ltd at its Warwick* factory. It is part of an order for bordered carpet squares totalling 3,000 sq yd for the ground floor and reception of the prestige Plaza Hotel in New York's Fifth Avenue. Inspecting it before despatch are, left to right, Alan Sinclair, head designer, D. A. Edwards, technical *manager, Cyril McGarry, managing director, and Ray Cunliffe, general* manager.



Toxic substances control act. On 21 April, the Environmental Protection Agency published in the *Federal Register* proposed rules for the procedures to be followed for rulemaking as required under the Toxic Substances Control Act.

Comments should be sent by 1 July 1977 to the Special Assistant to the General Counsel (A-130), Office of General Counsel, Environmental Protection Agency, 401 M Street SW, Washington DC 20460.

Inquiries: CRE 01-215 5397.

Product safety: banned hazardous substance. The US Consumer Product Safety Commission voted unanimously on 7 April 1977 to ban the flame-retardant chemical Tris (2,3,Dibromopropyl) phosphate, commonly known as Tris, in the following products:

a all children's garments sizes 0 to 14 inclusive, and
b uncut cloth intended for use in such garments.

The action was taken under the Federal Hazardous Substances Act and specifically involves defining products listed above as 'banned hazardous substances'. Under the act manufacturers, distributors and dealers are required to re-purchase all banned hazardous substances; importers are considered manufacturers for enforcement purposes.

Tris was primarily used to achieve flame resistance in children's sleepwear made of acetate: acetate blends: triacetate: and triacetate blends. It was also often used in 100 per cent polyester products.

Inquiries: CRE 01-215 5397.

Power lawn mowers. The *Federal Register*, 5 May, published a proposal by the Consumer Product Safety Commission to establish a safety standard for various types of power lawn mowers.

Written comments (five copies) before 5 July 1977 should be sent to Consumer Product Safety Commission, 1111 18th Street NW, Washington DC 20207.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Uruguay

Exemptions from additional import tax. Decree 179, 30 March, extends until 30 June 1977 the exemptions from the payment of the 18 per cent additional import tax granted to certain items.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Concessions on machinery for wool yarn. Decree 206, 13 April, grants concessions on the import of machinery for the manufacture of wool yarn until October. Imports of this machinery will be exempted from the payment of surcharges (but not from the 10 per cent minimum surcharge), consular fees, and any other import duty or tax, except charges for services, provided:

1 similar machinery is not manufactured in Uruguay, and
2 the importer undertakes to export wool and yarns equal to the value of the machinery imported.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Concession on imports of raw cellulose sulphate. Decree 176, 30 March, extends until 31 October 1977 the concessions previously granted by decree 932/73 on imports of crude cellulose sulphate for the manufacture of multi-ply paper sacks, which may now be imported free of customs duties and other import charges until 31 October 1977.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Concessions for imports of pesticides. Decree 161, 18 March, extends for a period of one year from 11 December 1976 the concessions granted by decree 953, 11 December 1975 whereby the import of goods for fighting agricultural diseases and raw materials for manufacture of such goods are exempt from the payment of customs duties and taxes and also port dues.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Imports of lorry kits. Decree 175, 30 March, extends decree 505, 5 August 1976, by which the importation of kits for lorries of up to 15 tonnes was permitted. Decree 175 states that such imports will be allowed in order to assist in completing the 1977 assembly programme. These kits may be imported free of surcharges, port dues and consular fees.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			£ million 18,218	10,396	1,829	1,977	£ million		
1970	100.0	31,644	9,453	2,130	1,799	442	325	68	−14	733	−25	758
1971	101.7	32,505	9,681	1,991	1,930	99	−148	52	22	1,087	280	807
1972	104.3	34,402	9,870	1,739	2,071	39	−145	48	15	131	−702	833
1973	110.3	36,003	10,279	1,872	2,390	1,127	404	102	382	−752	−2,334	1,582
1974	109.8	35,590	10,124	2,024	2,289	602	666	81	−111	−3,380	−5,221	1,841
1975	107.6	35,234	9,991	1,737	1,970	−680	−392	−111	−23	−1,635	−3,195	1,560
1976	108.9	35,290	9,562	1,651	1,898	−8	−4	22	1	−1,423	−3,592	2,169
1975 1st qtr.	109.4	8,988	2,534	471	492	−125	18	−31	−38	−544	−947	403
2nd qtr.	107.2	8,833	2,474	444	498	−267	−105	−54	−66	−295	−655	360
3rd qtr.	106.5	8,724	2,540	416	501	−208	−234	−29	38	−566	−967	401
4th qtr.	107.4	8,689	2,443	406	480	−80	−70	4	43	−230	−626	396
1976 1st qtr.	109.2	8,811	2,460	402	452	25	31	24	12	−80	−538	458
2nd qtr.	108.3	8,730	2,394	408	479	−97	−115	−22	−55	−439	−919	480
3rd qtr.	108.4	8,824	2,392	418	484	−22	4	10	22	−536	−1,148	612
4th qtr.	109.7	8,925	2,316	422	483	86	77	10	22	−368	−987	619
1977 1st qtr.		8,690 pe							80	−294	−954	660
% change last 2 qtrs. on prev. 2 qtrs.	+0.3	+0.3	−3.0	+3.7	+3.9							
on a year earlier	+2.0	+0.7	−5.5	+2.2	−1.4							

	Industrial production		Personal expenditure		Prices and costs (NOT seasonally adjusted)					Labour (UK)			Visible Trade (Volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Basic hourly wage rates of manual workers (all industries and services)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1970 prices		at 1971 prices	monthly averages									On a balance of payments basis: at 1970 prices	
Base of index £m in base year Series in	1970	1970	1971 15,895	thousands	Jan. 1974		1970	1970	July 1972	thousands		thousands	1970 7,907	1970 7,932
1971	100.5	99.7	100.0	108.5	153.4†	9.4	104.6	109.0	88.9	775.8	3.4	130.9	106.7	104.2
1972	102.7	102.4	105.8	138.6	164.3†	7.1	109.2	114.8	101.4	854.9	3.7	147.3	107.1	116.7
1973	110.3	110.0	110.7	137.1	179.4†	9.2	144.5	123.2	115.6	611.0	2 6	307.0	122.2	133.8
1974	*106.4*	*108.2*	*109.9*	*102 8*	*108.5*	*16.0*	*215.3*	*152.0*	*138.7*	*599.7ø*	*2.6ø*	*302.7ø*	*131.2*	*136.2*
1975	101.3	101.7	107.9	97.2	134.8	24.2	235.4	188.7	179.8	929.0	3.9	150.0ø	125.6	126.4
1976	102.2	103.4	108.1	104.7	157.1	16.5	299.0	219.6	214.5	1,269.8ø	5.4ø	120.4ø	135.9	134.2
1976 1st qtr.	101.8	101.8	107.3	103	149.4	22.5	266.5	206.9	205.5	1,220.3	5.2	116.7	131.5	126.1
2nd qtr.	102.4	103.6	107.6	106	154.9	16.0	292.6	214.4	212.8	1,252.1	5.3	119.4	137.1	134.6
3rd qtr.	101.5	103.5	108.9	97	158.5	13.7	306.8	223.2	218.6	1,305.5	5.5	123.6	*134.2*	*137.9*
4th qtr.	103.2	104.5	108.5	113	165.8	15.0	329.9	233.9	220.6	1,316.8ø	5.6ø	..	140.8	138.1
1977 1st qtr.	104.2 p	105.3 p	105.0	104	174.1	16.5	341.5 p	248.0 p	224.6 p	1,330.2	5.6		140.3	142.0
1976 Apr.	102.4	103.3	108.8	116	153.5	18.9	286.3	211.5	210.1	1,241.8	5.3	122.5	135.6	132.1
May	104.5	106.4	106.8	110	155.2	15.4	292.0	214.8	211.7	1,253.3	5.3	120.0	137.2	134.7
June	*100.5*	*101.1*	*107.3*	*91*	*156.0*	*13.8*	*299.6*	*217.0*	*216.6*	*1,261.1*	*5.3*	*115.7*	*138.5*	*137.1*
July	101.4	103.6	108.8	91	156.3	12.9	302.0	219.8	219.0	1,288.9	5.5	118.6	130.4	139.4
Aug.	100.6	102.5	108.9	115	158.5	13.8	304.0	223.4	219.1	1,308.8	5.6	126.2	*134.9*	*133.7*
Sept.	102.4	104.4	108.9	86	160.6	14.3	314.4	226.3	219.2	1,318.7	5.6	125.9	137.3	140.4
Oct.	102.8	104.8	108.1	109	163.5	14.7	327.7	230.0	219.5	1,307.9	5.5	124.5	140.8	140.6
Nov.	103.4	104.9	109.2	119	165.8	15.0	331.8	234.6	220.7	..	..	..	138.1	140.1
Dec.	103.3	103.9	108.3	111	168.0	15.1	330.2	237.2	221.5	1,325.7 e	5.6 e	..	143.3	133.6
1977 Jan.	*104.3*	*105.0*	*106.7*	*93*	*172.4*	*16.6*	*337.8*	*244.9*	*223.8*	*1,338.2*	*5.7*	..	*140.6*	*153.6*
Feb.	104.0	105.2	105.7	118	174.1	16.2	339.5	248.2	224.8	1,331.4	5.6	150.5	138.0	133.7
Mar.	104.3 p	105.7 p	103.1	102	175.8	16.7	347.2 p	250.8 p	225.2	1,321.1	5.6	157.3	142.2	138.8
Apr.			104.0 p	108	180.3	17.5	349.1 p	255.1 p	225.9 p	1,322.6 p	5.6 p	158.5 p	148.4	138.1
% change latest 3 months on prev. 3 months	+1.0	−0.7	−3.7	+1.5	+4.7		+3.6	+5.2	+1.5	−0.1			+1½	−4
a year earlier	+2.3	+3.4	−2.5	+2.5	+16.8		+25.6	+20.2	+8.2	+7.5			+7½	+7½

p Provisional pe Preliminary estimate † Base of index Jan. 1962 = 100 .. not available ø Average of available months e estimate

Inquiries: 01-215 3453

Index of industrial production for March

The provisional estimate for the total all-industries' index in March 1977 is 104.3 and that for manufacturing alone is 105.7 (1970 = 100).

The level of industrial output continued to rise slowly in the first quarter of 1977.

It is provisionally estimated that, before any adjustment to allow for the use of delivery indicators (see below), the average levels of the all-industries' index and the corresponding index for manufacturing industries in the first quarter of 1977 were 1 per cent and about ½ per cent respectively above their levels in the preceding quarter. The analysis by broad market sectors shows that, over the same period, the output of the investment goods industries rose by 2 per cent, whilst the output of both the consumer goods and intermediate goods industries rose by about ½ per cent.

On a longer-term comparison, the all-industries' index in the latest three months was about 2½ per cent above its level in the same period a year ago; the corresponding rise for manufacturing industries was 3½ per cent.

The use of series for some industries which measure deliveries rather than production resulted in the all-industries' index understating the level of output in the first quarter of 1976 by about ¼ per cent, overstating it by about ¾ per cent in the second and third quarters, and understating it again by about ¼ per cent in the fourth quarter.

The index numbers are all seasonally adjusted. The seasonal adjustment process is designed to remove annually recurring month-to-month variations due, for example, to the incidence of holidays. The adjustments, however, can in general only be derived from analysis of past experience, and may not therefore be completely appropriate when holiday patterns change sharply. The introduction of a public holiday on new year's day seems to have led to more shutdowns of industrial plant in the last week of December and early in January. Similarly, there is some unquantifiable evidence to suggest that some industrial establishments took holidays at the beginning of June 1976, immediately following the spring bank holiday on 31 May – in recent years most of such holidays would have fallen in May. The seasonal adjustment process may not yet have fully reflected these changing holiday patterns.

Inquiries: 01-233-8310.

Index of industrial production

Seasonally adjusted — 1970 = 100

	Total all industries	All industries other than construction	Mining and quarrying	Manufacturing industries												
				Total	Food, drink and tobacco					Engineering and allied industries						
					Total	Food	Drink and tobacco	Coal and petroleum products	Chemicals and allied industries	Total	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering	Total vehicles	Metal goods n.e.s.
Weights	1,000	850	37	745	84	52	32	7	58	319	100	15	67	16	73	48
1971	100.5	100.1	100.0	99.7	100.6	99.9	101.7	103.3	102.1	99.4	100.2	100.8	101.7	96.6	100.2	93.6
1972	102.7	102.4	84.1	102.4	104.9	104.0	106.4	102.5	108.1	100.1	95.0	93.0	110.2	91.8	104.2	95.7
1973	110.3	110.8	92.6	111.0	109.3	106.3	114.2	110.0	120.9	108.8	103.4	101.7	125.2	95.1	107.1	103.2
1974	106.4	107.9	78.8	108.2	109.9	104.5	118.8	106.0	127.9	106.7	103.4	104.9	120.6	98.9	102.5	103.9
1975	101.3	102.6	86.0	101.7	108.6	101.1	121.1	92.0	116.3	101.8	102.0	101.1	113.1	98.0	96.7	95.2
1976	102.2	104.5	89.2	103.3	110.6	103.2	122.7	96.3	127.9	99.8	98.4	102.2	111.8	88.9	96.8	93.4
1976 1st qtr	101.9	103.3	87.6	101.8	106.2	100.6	115.4	94.5	123.6	98.8	99.1	97.8	108.1	88.1	96.3	92.8
2nd qtr	102.4	104.5	88.9	103.6	112.6	105.1	124.9	96.5	127.2	100.2	99.7	103.9	111.4	89.5	97.2	92.7
3rd qtr	101.5	104.1	86.4	103.5	112.5	103.6	127.1	96.2	128.6	99.7	97.6	101.9	113.1	89.5	97.1	92.2
4th qtr	103.2	106.1	94.0	104.5	111.0	103.4	123.4	98.0	132.3	100.5	97.4	105.2	114.5	88.6	96.7	95.9
1977 1st qtr	104.2	107.0	101.5	105.3	110.2	103.5	121.2	97.0	131.0	101.9	99.9	107.1	115.5	85.8	97.5	97.5
1976 Jan	101.1	102.4	90	101.5	103	98	109	91	121	98	99	96	107	85	94	95
Feb	102.5	104.1	87	102.1	107	101	118	94	124	99	99	98	108	89	98	92
Mar	101.9	103.4	86	101.8	109	103	119	98	127	99	100	100	109	91	96	91
Apr	102.4	104.4	89	103.3	113	105	124	99	126	100	100	103	111	92	96	92
May	104.5	106.9	89	106.4	113	107	123	92	126	102	100	104	111	84	103	99
Jun	100.5	102.2	88	101.1	112	103	127	98	129	98	99	105	112	93	92	87
Jul	101.4	104.0	85	103.6	112	104	126	95	126	101	98	102	112	86	106	89
Aug	100.6	103.0	87	102.5	111	103	125	91	127	99	98	102	113	92	90	95
Sept	102.4	105.2	88	104.4	114	104	130	103	133	99	97	102	114	91	95	93
Oct	102.8	105.7	91	104.8	111	104	122	101	129	101	97	104	114	82	98	98
Nov	103.4	106.4	94	104.9	112	105	123	98	136	101	98	105	115	92	99	94
Dec	103.3	106.3	96	103.9	110	102	125	94	132	100	98	106	115	91	93	95
1977 Jan	104.3	107.1	100	105.0	107	103	113	91	126	102	99	106	115	77	100	97
Feb	104.0	106.8	102	105.2	111	104	123	104	133	101	100	107	115	88	93	98
Mar	104.3	107.2	103	105.7	113	104	128	96	134	103	100	108	116	92	99	98
% change latest 3 months on previous 3 months	+1.0	+0.8	+8.0	+0.7	−0.7	+0.1	−1.8	−1.0	−1.0	+1.3	+2.6	+1.8	+0.9	−3.1	+0.8	+1.7
on a year earlier	+2.3	+3.6	+15.9	+3.5	+3.7	+2.8	+5.0	+2.7	+5.9	+3.1	+0.8	+9.5	+6.8	−2.6	+1.2	+5.1

Government Publications in the West

from

Her Majesty's Stationery Office, Wine Street, Bristol, BS1 2BQ

	Manufacturing industries (continued)													Construction	Gas, electricity and water
	Metal manufacture			*Textiles, leather and clothing*				*Bricks, pottery, glass, etc*							
	Total	Ferrous	Non-ferrous	Total	Textiles	Leather, *leather* goods and fur	*Clothing* and footwear	Total	*Bricks*, cement, etc	Pottery and glass	*Timber*, furniture, etc	Paper, printing and publishing	Other manufacturing *industries*		
Weights	57	43	14	76	49	3	24	27	17	10	22	64	31	146	72
1971	91.3	89.8	95.8	102.2	100.6	103.0	105.4	108.1	107.0	109.8	103.0	97.3	99.8	103.0	103'9
1972	91.4	89.4	97.3	104.5	102.9	104.5	107.8	115.2	115.1	115.3	113.5	102.6	104.3	104.4	111.4
1973	100.0	97.3	108.5	110.1	108.6	101.1	114.6	126.0	123.7	129.5	132.6	112.1	116.6	107.5	118.1
1974	91.7	87.7	104.2	103.1	99.2	94.9	112.2	116.6	108.3	129.5	112.1	108.8	114.5	98.2	118.6
1975	78.6	74.2	92.2	99.5	93.8	92.9	112.2	107.7	99.7	120.4	110.2	95.6	105.5	93.5	120.6
1976	85.2	82.0	95.2	101.4	97.2	95.3	111.0	110.4	100.8	125.4	111.1	97.2	114.4	89.2	123.9
1976 1st qtr	83.2	79.7	94.1	102.5	98.4	98.5	111.5	110.8	104.0	121.5	111.2	95.6	111.4	93.3	127.3
2nd qtr	87.8	84.9	96.9	99.5	95.1	92.8	109.3	108.3	100.5	120.5	109.7	97.9	112.9	90.7	121.5
3rd qtr	84.6	81.5	94.3	101.3	97.0	94.6	110.9	112.3	101.3	129.5	111.5	97.1	112.3	86.7	118.5
4th qtr	85.3	82.0	95.4	102.5	98.2	95.5	112.2	110.3	97.6	130.1	111.9	98.2	121.0	86.1	128.5
1977 1st qtr	85.5	80.9	99.5	106.1	100.6	95.9	118.7	107.9	93.7	130.2	107.7	100.2	121.7	88.1	127.2
1976 Jan	88	86	95	107	104	99	116	107	102	115	113	95	108		118
Feb	82	78	94	102	99	99	111	112	104	125	113	97	113		134
Mar	80	75	93	98	93	99	107	113	106	125	109	95	113		129
Apr	85	81	96	99	96	93	107	109	102	119	110	99	113		123
May	102	101	108	104	99	93	116	109	100	122	116	99	115		121
June	76	73	87	95	91	93	105	107	99	120	103	96	111		120
Jul	86	82	97	100	96	95	108	113	100	133	111	98	107		117
Aug	86	84	91	101	97	95	110	110	100	125	111	97	108		117
Sept	82	78	94	103	98	95	114	114	104	130	113	96	122		122
Oct	90	86	101	103	99	95	112	108	97	126	117	100	119		122
Nov	85	84	89	101	98	95	109	112	98	133	110	96	124		128
Dec	81	76	96	104	98	95	116	111	98	131	108	98	120		136
1977 Jan	92	89	102	108	102	96	120	107	91	131	109	100	121		132
Feb	84	79	98	106	100	96	120	107	95	126	108	101	123		125
Mar	80	74	98	105	99	96	117	110	95	134	106	100	121		124
% change latest 3 months on previous 3 months	+0.2	−1.3	+4.3	+3.5	+2.4	+0.4	+5.8	−2.1	−4.0	+0.1	−3.7	+2.0	−0.6		−1.0
on a year earlier	+2.7	+1.5	+5.7	+3.5	+2.2	−2.7	+6.5	−2.6	−9.9	+7.1	−3.2	+4.7	+9.2		−0.1

Inquiries: 01-233 8310.

Index of industrial production for Wales: fourth quarter 1976

Preliminary results of the index of industrial production for Wales indicate that industrial output in Wales recovered slightly in 1976 from the low level recorded for 1975. At 102.2 (1970 = 100) the index is, however, over 9 per cent below the level established in the peak year of 1973. For comparison the United Kingdom index rose from 101.3 in 1975 to 102.3 in 1976.

There were, however, some notable changes between 1975 and 1976 in the major components of the all industries index. While the index for mining and quarrying declined by over 8 per cent, and construction activity fell by 12 per cent, manufacturing output rose by 5½ per cent (due mainly to a partial recovery of the steel industry, and a further advance in the chemicals sector), and the utilities (gas, electricity and water) by nearly 16 per cent. In market sector terms (table 2), both the consumer and the intermediate goods sectors advanced over the year, only the investment goods sector declining (from 124.3 in 1975 to 118.4 in 1976).

During the fourth quarter of 1976, after virtually no change earlier in the year, the all industries index is provisionally estimated to have risen by over 4½ per cent, to 105.4. In the United Kingdom as a whole (although due allowance must be made for the marked difference between the industrial structures of the two economies) the all industries index increased by 1.7 per cent. Output in mining and quarrying remained almost unchanged, as did activity in the building trades. Manufacturing activity, however, increased by nearly 5 per cent, and advances were recorded in most industries. Significant gains were registered in non-ferrous metal manufacture (19 per cent), engineering and allied industries (6 per cent) – particularly electrical engineering (12 per cent) – textiles, leather and clothing (6 per cent) and bricks, pottery, glass, cement, etc (6 per cent). The only fall of any note occurred in other manufacturing industries (−4 per cent). The index for gas, electricity and water, at 148 (+8 per cent) reached its highest level since 1974 (a peak year).

Table 2 (page 410) shows that, during the fourth quarter, the consumer goods sector sustained the growth of recent quarters, as did the investment goods sector (both rose by some 5 per cent over the quarter), while, at 101.4, the important intermediate goods sector (subsuming the steel industry) was at its highest level since mid-1974, (but still remains some 6 per cent below the average level for 1973).

Inquiries: Cardiff (0222) 28066 ext. 394.

Continued on page 410

Government Publications in Wales

from

Her Majesty's Stationery Office, 41 The Hayes, Cardiff, CF1 1JW

TABLE 1 Index of industrial production for Wales[1]

Seasonally adjusted indices 1970 = 100

1968 SIC	1970 weights per thousand	Annual indices				Quarterly indices 1975				1976			
		1973	1974	1975	1976	1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr (2)
Total: all industries	1,000	112.6	107.0	99.1	102.2	107.0	96.9	96.0	96.4	101.2	101.2	100.8	105.4
Mining and quarrying	85	82	62	73	67	76	72	70	72	68	65	67	68
Total: all manufacturing industries	701	116.9	111.5	102.2	107.7	110.0	98.6	100.2	100.0	105.5	106.7	106.6	111.8
Food, drink and tobacco	40	120	134	146	152	147	147	150	142	144	154	154	154
Coal and petroleum products	37	106	128	99	101	105	104	95	95	100	99	100	105
Chemicals and allied industries	47	131	142	130	154	128	122	125	144	152	151	154	159
Metal manufacture	199	102	86	72	83	95	60	65	67	78	86	80	88
Ferrous	166	99	79	65	75	92	51	56	60	70	78	72	77
Non-ferrous	33	114	121	108	126	113	106	109	103	116	128	118	140
Engineering and allied industries: total	222	118	118	115	116	117	116	114	113	116	114	114	121
Mechanical and instrument engineering	62	110	115	107	101	108	110	108	100	105	100	97	101
Electrical engineering	56	140	137	147	153	148	152	147	141	149	144	151	169
Vehicles, including aircraft and ship-building	65	110	109	104	112	105	98	101	113	111	115	110	113
Metal goods not elsewhere specified	39	113	113	100	96	108	102	97	94	94	93	97	98
Textiles, leather and clothing	59	123	107	96	89	94	98	100	93	93	85	87	92
Bricks, pottery, glass, cement, etc	20	152	135	117	106	122	120	131	97	104	105	105	111
Timber, furniture, etc	13	150	124	130	135	123	128	131	138	134	133	136	136
Paper, printing and publishing	31	116	90	72	74	79	67	70	72	76	76	73	72
Other manufacturing industries	32	147	145	130	142	132	123	132	134	138	127	155	149
Construction	146	102	92	90	79	98	93	85	82	85	78	76	77
Gas, electricity and water	68	130	149	120	139	133	118	108	120	134	139	137	148

Source: Welsh Office.

(1) For technical reasons (due largely to seasonal adjustment), and as a result, in some cases, of improved indicators, small revisions have been made to some series since the first quarter of 1975. Those interested in receiving the revised series should write to Economic Services Division (ES2a), Welsh Office, Cathays Park, Cardiff.
(2) Provisional.

TABLE 1a UK index – key components

Seasonally adjusted indices 1970 = 100

Total: all industries	1,000	110.3	106.4	101.3	102.3	104.7	100.3	99.7	100.4	101.9	102.4	101.5	103.2
Mining and quarrying	37	93	79	86	90	87	85	84	87	88	89	86	95
Total: all manufacturing industries	745	110	108.2	101.7	103.3	106.1	100.5	99.7	100.4	101.8	103.6	103.4	104.5
Construction	146	108	98	94	89	93	94	94	93	93	91	87	86
Gas, electricity and water	72	118	119	121	124	123	119	117	124	127	121	119	128

Source: Central Statistical Office.

TABLE 2 Index of industrial production for Wales: market sector analysis[1]

Seasonally adjusted indices 1970 = 100

1968 SIC	1970 weights per thousand	Annual indices				Quarterly indices 1975				1976			
		1973	1974	1975	1976	1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr (2)
Consumer goods sector	137	136.1	127.0	125.3	130.2	125.2	127.1	126.2	122.5	123.2	126.0	132.3	139.2
Intermediate goods sector	594	107.6	101.8	90	97.5	100.2	86.0	85.1	88.1	95.3	97.9	95.5	101.4
Investment goods sector	123	124.2	128.8	124.3	118.4	125.9	123.0	124.5	123.9	124.0	109.9	116.9	122.7

Source: Welsh Office.

(1) See footnote (1) table 1.
(2) Provisional.

TABLE 2a UK index

Seasonally adjusted indices 1970 = 100

Consumer goods sector	249	118.9	116.6	111.0	112.4	115.6	109.5	109.5	109.4	110.0	111.7	113.5	114.5
Intermediate goods sector	363	109.4	104.8	98.2	103.1	102.6	96.3	95.1	98.7	102.4	102.9	101.3	105.7
Investment goods sector	238	104.5	103.5	100.6	98.3	103.6	100.8	99.5	98.6	97.7	99.3	98.1	98.2

Source: Central Statistical Office.

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PQ444 Overalls and men's shirts, underwear, etc for fourth quarter 1976
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Office development permits: first quarter 1977

The Department of the Environment reports that the total floor area comprised in office development permits issued in the first quarter of 1977 was 3.4 million sq ft compared with 4.0 million sq ft in the first quarter of 1976 and a quarterly average of 3.6 million sq ft for 1976 as a whole. Fifty permits were issued in the first quarter of 1977, 29 less than in the corresponding quarter of 1976.

After deduction of relinquishments of existing offices and of floorspace covered by permits for the continuing use of existing offices included in the total figures, there was a potential addition to office space by way of new building and conversion of non-office premises to office use of 2.7 million sq ft in the first quarter of 1977. This compares with 2.1 million sq ft for the corresponding quarter of 1976 and a quarterly average of 1.8 million sq ft for 1976 as a whole.

Thirteen of the 50 permits issued in the first quarter of 1977 were for office development in Central London and covered 0.8 million sq ft; 14 covering 1.4 million sq ft were for development in Greater London excluding the centre; and 17 covering 0.7 million sq ft for development in the Metropolitan Region outside Greater London. Six permits for a total floorspace of 0.4 million sq ft were issued in the part of the South East Planning Region lying outside the Metropolitan Region.

Tables showing office development permits since 1965 appeared in *Trade and Industry*, 25 March 1977.

Areas are shown in sq ft pending legislation to allow for metrication.

TABLE 1 Office development permits – sub-divisions of South East Planning Region

	Central London			Rest of Greater London			Total Greater London			Metropolitan region (excluding Greater London)			Total Metropolitan region			South East (excluding Metropolitan region)			Total South East		
		thousand sq ft			thousand sq ft			thousand sq ft			thousand sq ft			thousand sq ft			thousand sq ft			thousand sq ft	
	No.	gross	relinquished	No.	gross	relinquished	No.	gross	relinquished	No.	gross	relinquished	No.	gross	relinquished	No.	gross	relinquished	No.	gross	relinquished
1975	64	4,883	448	106	5,414	442	170	10,297	890	86	2,258	51	256	12,555	941	46	1,319	113	302	13,874	1,054
1976	75	6,545	1,119	82	3,376	155	157	9,921	1,274	66	2,714	71	223	12,635	1,345	38	1,791	71	261	14,426	1,416
1976 1st qtr.	19	1,682	449	20	687	67	39	2,369	516	27	1,053	45	66	3,422	561	13	627	3	79	4,049	564
2nd qtr.	15	957	112	23	958	82	38	1,915	194	19	871	6	57	2,786	200	12	408	—	69	31,94	200
3rd qtr.	21	1,893	311	22	935	1	43	2,828	312	12	376	16	55	3,204	328	6	325	68	61	3,529	396
4th qtr.	20	2,013	247	17	796	5	37	2,809	252	8	414	4	45	3,223	256	7	431	—	52	3,654	256
1977 1st qtr.	13	798	100	14	1,404	19	27	2,202	119	17	731	2	44	2,933	121	6	429	—	50	3,362	121

Notes to tables

Application of controls. Control was applied to the Metropolitan Region (Greater London and part of the South East Region) from 5 August 1965, but with retrospective application to 5 November 1964 for some projects, and to the West Midland conurbation from 14 August 1965. In July 1966 control was extended to the remainder of the South East and West Midland Regions and to the whole of the East Midland and East Anglia Regions. In February 1969 East Anglia and rural parts of the Midlands were excluded and since December 1970 control has applied only to the South East Region.

Modifications to Controls. On 1 June 1976 the exemption limit for permits throughout the South East Region was raised to 15,000 sq ft. Office development permits are not required for offices ancillary to industrial development covered by an appropriate industrial development certificate.

Definition of Areas,

CENTRAL LONDON – As defined in the General Register Office's 'Census 1961, County Report: London'.

METROPOLITAN REGION – From 1 January 1972, for statistical purposes only, the Outer Metropolitan sub-division (rest of Metropolitan Region) is as defined in the Regional Abstract of Statistics no. 7. Otherwise the Metropolitan Region is as defined in section 85 of the Town and Country Planning Act 1971 as amended by article 13 of the Local Authorities etc. (Miscellaneous Provisions) Order 1974 (SI 1974 no. 482).

SOUTH EAST PLANNING REGION – From 1 January 1972, for statistical purposes only, the Outer South East sub-division (rest of South East Planning Region) is as defined in the Regional Abstract of Statistics no. 7. Otherwise the South East Planning Region corresponds to the standard region for statistical purposes as defined in the *Board of Trade Journal* of 31 December 1965, page 1567, as amended with effect from 18 July 1974 in accordance with the Control of Office Development (Designation of Areas) (Variation) Order 1974 (SI 1974 no. 1054) to correspond with the new standard region adjusted to take account of local government reorganisation.

Area Relinquished. Comprises office floor space relinquished for demolition or change of use to non-office uses.

Index of retail prices for April

The index of retail prices for all items for 19 April 1977 was 180.3 (15 January 1974 = 100). This represents an increase of 2.6 per cent on March 1977 (175.8) and of 17.5 per cent on April 1976 (153.5).

The rise in the index in April was due to increases in local rates, rents and water charges; to increases in the prices of cigarettes, petrol and motor vehicle licenses arising from the March 1977 budget changes in indirect taxation; to increases in domestic fuel and home maintenance costs; and to increases in the prices of many foods and other goods, particularly fresh fruit and vegetables (other than potatoes), alcoholic drinks, tea and coffee, books, newspapers and periodicals. The movements for the main groups of the index are shown in table 2.

Table 1 Index of retail prices

	All items				All items except seasonal foods		
	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months	12 months	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months
1976							
November	165.8	+1.4	+6.8	+15.0	164.8	+1.2	+6.9
December	168.0	+1.3	+7.7	+15.1	166.8	+1.2	+7.3
1977							
January	172.4	+2.6	+10.3	+16.6	170.9	+2.5	+9.0
February	174.1	+1.0	+9.8	+16.2	172.5	+0.9	+8.8
March	175.8	+1.0	+9.5	+16.7	174.3	+1.0	+8.9
April	180.3	+2.6	+10.3	+17.5	178.7	+2.5	+9.8

Table 2 Index of retail prices: commodity breakdown

	Indices (15 January 1974 = 100)		Percentage change over the month
	15 March 1977	19 April 1977	
All items	175.8	180.3	+2.6
All items excluding food	172.6	177.6	+2.9
Food	186.5	189.6	+1.7
Seasonal food	215.7	223.9	+3.8
Other food	181.0	183.2	+1.2
Alcoholic drink	179.3	181.2	+1.1
Tobacco	193.7	206.5	+6.6
Housing	155.7	166.3	+6.8
Fuel and light	198.7	202.9	+2.1
Durable household goods	162.0	163.7	+1.0
Clothing and footwear	153.4	153.8	+0.3
Transport and vehicles	182.4	189.1	+3.7
Miscellaneous goods	180.9	185.9	+2.8
Services	168.1	170.0	+1.1
Meals out	176.5	178.8	+1.3

Retailers' stocks in March

Based on the non-seasonally adjusted data of table 1, the level of stocks at book value in March was 21 per cent higher than a year earlier; at constant prices the rise was 3 per cent.

The estimate of the value of the physical increase in retailers' stocks at 1970 prices and seasonally adjusted suggests a large increase in stocks in March following four consecutive monthly falls. The seasonally adjusted volume of retail sales fell in each of the first three months of 1977; there was a fairly sharp fall of around 2½ per cent in March.

Notes

The book value of retailers' stocks in the United Kingdom at end of December 1971 was £1,886 million.

With the introduction of VAT, the book values are being valued exclusive of this tax. There is, therefore, a discontinuity in the series in 1973 between March and April. For the year up to March, 1974, the usual comparisons with a year earlier for the book value series have not been given. From April, 1974, the basis of valuation is comparable with that of a year earlier and the percentages changes have been re-introduced. The estimates at constant prices take account of this method of valuation, and are on a consistent basis throughout.

For the estimates at constant prices, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which constant price changes have been measured is likely to have been reduced in recent periods.

The statistics given in table 2 were introduced in an article in the issue of 28 March 1975.

Long-run series back to 1966 for both table 1 and table 2 were included in the article in the issue of 17 September 1976.

Inquiries: 01-215 3220.

TABLE 1 Level of retailers' stocks

Index numbers (end 1971 = 100) *and percentage increase on a year earlier* — At cost at end of month

	January	February	March	April	May	June	July	August	September	October	November	December
At book values:												
1971	89	91	94	95	95	97	95	95	98	106	110	100
1972	96	99	101	102	102	105	102	102	104	113	119	106
1973	103	107	112	112	112	117	116	118	123	134	143	132
1974	128	129	135	139	144	145	144	143	149	161	171	154
1975	148	151	158	154	159	161	160	160	170	187	201	181
1976	172	174	184	185	184	184	180	181	193	215	230	207
1977	199	203	223									
1972	8	8	8	7	8	8	7	8	7	7	8	6
1973	8	8	10	—	—	—	—	—	—	—	—	—
1974	—	—	—	24	28	24	24	21	21	20	19	17
1975	15	17	17	11	11	11	11	12	15	16	18	18
1976	16	15	17	20	16	14	13	13	14	15	14	14
1977	16	17	21									
At constant (1970) prices:												
1971	94	96	98	98	97	99	96	96	98	106	111	100
1972	95	97	100	100	100	102	99	99	101	108	114	101
1973	98	101	105	110	114	117	115	115	119	127	135	123
1974	118	117	120	121	122	121	119	117	119	126	132	117
1975	110	109	113	108	109	110	107	106	112	122	129	115
1976	108	109	114	113	112	112	108	108	113	124	130	115
1977	109	109	118									
1972	1	2	2	2	3	4	3	4	2	2	3	1
1973	3	4	5	10	13	15	16	16	18	18	19	22
1974	21	16	14	9	8	3	3	1	−1	−1	−2	−5
1975	−7	−6	−6	−11	−11	−10	−10	−9	−6	−4	−2	−1
1976	−1	−1	1	5	2	2	1	1	2	2	1	—
1977	1	—	3									

TABLE 2 Value of physical increase of retailers' stocks at 1970 prices

Seasonally adjusted — £ million

	January	February	March	April	May	June	July	August	September	October	November	December
1971	−11	3	−8	2	−12	17	−7	16	5	24	−14	7
1972	−7	9	−1	13	6	21	−16	25	−22	9	−6	−16
1973	34	25	23	106	57	42	15	21	12	3	11	33
1974	12	−50	—	33	25	−39	10	−24	−25	−4	−19	−30
1975	−19	−30	11	−76	20	−10	5	−6	39	41	15	−13
1976	−24	−10	46	−5	−25	−25	−14	5	31	52	−2	−28
1977	−7	−22	109									

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Textiles: made-up clothing orders and deliveries in February

In the three months ended February 1977, deliveries by the clothing industry were provisionally estimated to have been 9 per cent higher than in the preceding three months while net new orders were 10 per cent higher. Orders-on-hand at the end of February 1977 were 1 per cent lower than the end-November 1976 level. (These comparisons are based on the seasonally adjusted series in the accompanying table.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years.

Made-up clothing

Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1969 = 100		Average 1970 Deliveries = 100		Average 1970 Deliveries = 100	
1968	107		100		97	
1969	100		97		97	
1970	103		102		100	
1971	119		108		104	
1972	125		110		109	
1973	155		123		117	
1974	145		115		114	
1975	142		118		115	
1976 p	133		115		111	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1975 1st quarter	135	139	116	124	116	121
2nd quarter	165	151	133	119	114	112
3rd quarter	129	141	97	114	114	115
4th quarter	142	149	128	117	116	112
1976 1st quarter	126	130	109	113	113	114
2nd quarter	148	135	126	116	106	109
3rd quarter p	122	133	98	116	109	111
4th quarter p	133	140	126	114	116	111
1975 January	138	137	101	119	103	124
February	134	136	121	123	125	122
March	135	139	124	129	120	119
April	148	147	135	112	118	107
May	167	149	147	120	109	115
June	165	151	116	125	114	115
July	145	145	84	112	110	114
August	132	139	84	109	103	117
September	129	141	123	122	128	115
October	135	140	154	118	135	115
November	144	140	138	110	121	110
December	142	149	91	123	92	111
1976 January	129	128	94	111	102	123
February	128	130	115	117	116	113
March	126	130	117	111	119	107
April	132	131	128	117	105	104
May	150	134	149	122	111	118
June	148	135	101	109	103	105
July p	133	134	93	124	106	111
August p	124	130	79	103	98	111
September p	122	133	122	121	123	111
October p	129	134	148	113	130	111
November p	136	132	138	110	120	110
December p	133	140	93	120	98	112
1977 January p	134	133	113	133	108	129
February p	129	131	124	126	126	122

Inquiries: 01-212 0116.

Engineering sales and orders up to February

SIC orders VII, VIII and IX

Provisional trend estimates and seasonally adjusted sales and orders in the engineering industries (SIC orders VII, VIII and IX) to February indicate an improved inflow of new orders and possibly the beginning of a recovery in total order book. While the receipt of new orders in the export sector has declined from a high level, the fall has been more than offset by a recovery in new orders from the home market. Both home and export sales have showed a slight improvement in recent months following a long period of little change. Export order books have continued to lengthen and there are tentative indications that the two-year decline in home order books may now be levelling out, with total orders-on-hand possibly beginning to edge upwards again.

The high inflow of new orders received by the combined engineering industries in the latest two months has reversed the trend and in February it was 3 per cent higher than in November. This improved situation reflected the home market where orders increased by 7½ per cent largely on account of an increased receipt of orders in the mechanical engineering sector. Between November and February export new orders declined, from a peak level, by 4½ per cent.

The upturn in new orders in the first three-quarters of last year has now started to work through to sales and the trend in total sales increased by 1 per cent between November and February with similar increases in both the home and export sectors.

Total orders-on-hand over the latest three months increased by 1½ per cent, masking different movements in the home and export sectors. The trend in home orders-on-hand continued to shorten and were ½ per cent lower in February than in November, whilst in the export sector the receipt of new orders remains above the level of sales and in consequence the size of the order book increased by 4 per cent.

The revised figures published in the table (page 414) are based on the monthly engineering inquiry relating to February 1977. The response rate of 83 per cent to the inquiry for February 1977 is judged sufficient to justify publication of provisional indices for this month. Taking into account late returns now received for November, December 1976 and January 1977 response rates for these months were 92, 92 and 88 per cent, respectively.

When using the volume index numbers and trends shown in the accompanying table, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the values of engineering sales and orders to constant prices become more acute. Because of these difficulties the relative accuracy of the volume estimates is likely to have been reduced in recent months and studies are currently in hand to ascertain the possible directions and magnitudes of any biases, which may lead to revisions in due course.

An expanded commentary, together with additional tables, is given in Business Monitor PM 33-36, Engineering (volume indices of sales and orders), obtainable from HMSO, PO Box 569, London SE1 9NH, post free for a subscription of £2.22 per annum. Separate commentaries and volume indices are given for sales, orders-on-hand and net new orders for total, home and export markets, for mechanical, instrument and electrical engineering (SIC orders VII, VIII and IX, respectively).

Inquiries:
Telephone inquiries should be addressed to:
01-215 5770.

Continued on page 414

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Index numbers for the combined engineering industries (SIC orders VII, VIII and IX) (a)

Volume index numbers: Orders-on-hand, December 1970 unadjusted = 100 Net new orders and sales, 1970 average monthly sales = 100

	Total			Home			Export		
	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	Net new orders	Sales
Trend estimates									
1975 January	125	92	113	120	91	110	135	95	118
February	122	91	112	117	90	110	132	94	117
March	119	92	111	114	90	109	129	95	117
April	117	92	110	112	90	107	127	97	116
May	115	92	109	109	89	106	125	100	115
June	112	92	108	107	88	104	123	102	115
July	110	91	107	105	86	104	122	103	115
August	108	90	106	102	85	103	120	101	114
September	106	88	105	99	84	102	118	99	113
October	103	87	104	96	83	101	116	96	112
November	101	87	103	94	83	100	114	95	112
December	99	87	103	92	84	99	112	94	112
1976 January	97	88	103	90	86	98	110	94	114
February	95	90	103	89	88	98	108	96	116
March	93	93	104	87	89	99	106	101	117
April	92	95	105	86	90	100	105	106	118
May	91	97	105	84	90	100	104	113	119
June	90	100	105	83	91	100	105	121	118
July	90	103	105	82	92	100	106	128	118
August	90	105	105	81	94	100	108	133	117
September	90	107	105	81	95	100	110	136	117
October	91	108	106	80	96	101	112	137	118
November	91	109	106	80	98	101	115	136	118
December	92	110	106	79	100	101	116	134	119
1977 January	92	111	107	79	103	101	118	131	119
February	93	113	107	79	105	102	119	130	120
Percentage change (b) Nov 1976-Feb 1977	+1.5	+3.0	+1.0	−0.5	+7.5	+0.5	+4.0	−4.5	+1.0
Seasonally adjusted									
1969	101	100	97	102	99	99	100	102	91
1970	100	99	100	100	99	100	100	100	100
1971	93	97	101	95	98	101	89	93	102
1972	99	103	101	103	108	105	90	91	92
1973	133	134	113	134	136	117	131	131	102
1974	128	109	111	123	105	111	139	118	113
1975	99	90	108	91	87	105	113	98	115
1976	91	100	105	78	92	100	117	119	117
1975 1st quarter	119	89	112	114	89	110	128	89	118
2nd quarter	113	95	109	108	92	106	124	102	115
3rd quarter	106	90	107	100	86	103	118	101	114
4th quarter	99	85	103	91	80	100	113	98	112
1976 1st quarter	94	92	103	88	90	98	106	96	116
2nd quarter	90	95	106	83	90	101	103	107	119
3rd quarter	90	107	106	81	96	101	109	133	118
4th quarter	91	106	105	78	92	99	117	141	118
1975 January	124	86	114	119	85	112	135	88	119
February	122	97	113	117	98	111	132	95	118
March	119	85	110	114	85	108	128	85	117
April	116	94	112	111	94	111	126	95	115
May	115	100	107	110	94	104	126	114	115
June	113	90	106	108	86	103	124	98	115
July	109	84	109	104	77	105	121	99	120
August	108	93	102	102	84	99	121	115	110
September	106	94	109	100	96	107	118	88	113
October	103	84	107	96	79	104	116	96	112
November	101	85	103	94	83	98	113	89	114
December	99	87	100	91	77	96	113	110	110
1976 January	96	84	102	89	84	98	109	82	114
February	95	95	101	89	94	96	108	97	113
March	94	97	106	88	92	100	106	109	120
April	92	92	108	86	89	103	105	100	120
May	90	94	107	84	89	102	103	104	120
June	90	99	102	83	91	97	103	118	116
July	90	105	104	82	84	97	108	157	120
August	90	103	104	81	95	100	109	122	114
September	90	112	109	81	109	105	109	119	119
October	91	107	105	80	91	100	112	146	117
November	92	113	106	80	98	99	116	149	120
December	91	98	105	78	87	99	117	126	117
1977 January	92	117	108	79	109	102	119	136	121
February	93	115	108	81	114	103	119	118	118
Sept-Nov 1976 (av.)	92	111	107	80	99	101	116	138	119
Dec '76 Feb '77 (av.)	93	110	107	81	103	102	119	127	119
Percentage change (b)	+1.5	−0.5	—	+0.5	+4.0	—	+2.5	−8.5	—

(a) All figures are provisional.

(b) For orders-on-hand, the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period. The percentage changes have been based on the unrounded values and are given to the nearest half percentage point.

Metal-working machine tools: sales and orders in February 1977

Statistics of manufacturers' sales and orders for metal-working machine tools up to and including February 1977 are shown in table 1. These monthly statistics will be published in the Business Monitor PM 332, and full details of the quarterly inquiry will be published in Business Monitor PQ 332.

The monthly estimates up to and including June 1976 have been adjusted to be consistent with the more comprehensive quarterly inquiry recently published, and the latest provisional estimates will be revised when the appropriate information becomes available. Net new orders and orders-on-hand have been adjusted to the same basis of coverage and valuation as sales. A monthly employment series for the industry is provided in table 2 (page 416).

Summary

Provisional statistics for the three months up to February 1977 are now available. They confirm that the upward trend in activity of the industry is being maintained. The overall level of sales at current values in these last three months increased by 10 per cent over the previous three months, and total new orders received (net of cancellations) rose sharply by 20 per cent, over that same period. Although partly the result of higher prices, these increases mainly reflect growth in the volume of sales and orders. The trend in home investment is still weak, however, and the improvement has been mainly in export markets. The inflow of new orders received for the second month running has exceeded total deliveries made, thus reversing the downward trend of orders-on-hand that occurred during the last part of 1976, and by the end of February 1977 total order books were 3 per cent higher than three months earlier.

Recent trends for machine tools

The latest monthly statistics now available for the three months to February 1977 confirm that the high level of activity of the machine tools industry is being maintained. At £102 million for these three months, overall sales were 10 per cent higher than the previous three months and 14 per cent higher than the same period a year ago. Export sales at £39 million were 17 per cent higher than three months earlier but still 5 per cent below the level a year ago whilst home sales are maintaining a slow but steadier recovery. Deliveries to the home market, at £63 million, in these last three months were 6 per cent higher than three months previously and 31 per cent higher than the same period a year ago. While the latter includes the effect of price increases, it also reflects a moderate recovery in the volume of deliveries.

Total new orders received (net of cancellations) have continued to grow strongly, with export business still showing the greater contribution to the recent improvements. At £108 million, in current value terms, total new orders received in the three months to February 1977 recorded a marked increase of 20 per cent over the previous three months and a high rise of 35 per cent over the same period a year ago. Whilst part of this growth reflects the effect of the higher prices at which new orders have been made, there has also been a significant increase in volume terms compared with a year ago. Export orders have continued to rise sharply, with an inflow of £49 million for the three months to February, they showed a 69 per cent increase over the previous three months and were 33 per cent higher over the same period a year ago. Orders received from the home market, however, at £61 million over these last three months, levelled off at a relatively high rate; although slightly less than the current value of sales, they were 37 per cent higher than the inflow of home orders a year ago.

The value of total new contracts received was above the current rates of sales for the second month running and consequently order books for machine tools have begun to increase. At the end of February 1977, total orders outstanding at £203 million were more than 3 per cent higher than three months previously but still 6 per

TABLE 1 Metal-working machine tools: orders and sales

£ million

	Sales			Orders outstanding*			New orders		
	Total	Home	Export	Total	Home	Export	Total	Home	Export
1970	218.6	137.3	81.3	159.5	86.8	72.7	213.9	130.8	83.1
1971	207.7	121.7	86.0	106.0	46.0	60.0	154.2	80.9	73.3
1972	184.7	111.6	73.1	113.3	55.7	57.6	192.0	121.3	70.7
1973	213.2	129.1	84.1	216.0	120.4	95.6	315.9	193.8	122.1
1974	254.4	149.9	104.5	312.9	164.1	148.8	347.9	191.9	156.0
1975 r	327.9	189.0	138.9	224.2	112.3	111.9	239.2	137.2	102.2
1976 p	361.1	214.5	146.6	195.8	108.6	87.2	332.7	210.8	121.9
1975 1st quarter r	81.2	48.4	32.8	297.3	154.1	143.2	65.6	38.4	27.2
2nd quarter r	78.5	46.1	32.4	284.5	144.0	140.5	65.7	36.0	29.7
3rd quarter r	81.8	46.1	35.7	255.1	125.3	129.8	52.4	27.4	25.0
4th quarter r	86.4	48.4	38.0	224.2	112.3	111.9	55.5	35.4	20.1
1976 1st quarter r	93.6	49.4	44.2	207.1	105.4	101.7	76.5	42.5	34.0
2nd quarter r	85.5	50.2	35.3	198.6	103.7	94.9	77.0	48.5	28.5
3rd quarter p	85.1	53.3	31.8	199.2	108.3	90.9	85.7	57.9	27.8
4th quarter p	96.9	61.6	35.3	195.8	108.6	87.2	93.5	61.9	31.6
1975 October r	28.5	15.6	12.9	243.0	120.0	123.0	16.4	10.3	6.1
November r	28.0	16.8	11.2	226.0	109.9	116.1	11.0	6.7	4.3
December r	29.9	16.0	13.9	224.2	112.3	111.9	28.1	18.4	9.7
1976 January r	29.8	16.7	13.1	223.8	106.6	117.2	29.4	11.0	18.4
February r	30.4	15.5	14.9	216.2	106.5	109.7	22.8	15.4	7.4
March r	33.4	17.2	16.2	207.1	105.4	101.7	24.3	16.1	8.2
April r	27.4	17.0	10.4	209.6	104.2	105.4	29.9	15.8	14.1
May r	30.0	16.1	13.9	197.5	100.4	97.1	17.9	12.3	5.6
June r	28.1	17.1	11.0	198.6	103.7	94.9	29.2	20.4	8.8
July p	28.7	17.5	11.2	197.2	105.3	91.9	27.3	19.1	8.2
August p	25.1	16.1	9.0	201.3	107.5	93.8	29.2	18.3	10.9
September p	31.3	19.7	11.6	199.2	108.3	90.9	29.2	20.5	8.7
October p	30.5	18.6	11.9	198.4	111.8	86.6	29.7	20.1	9.6
November p	31.7	21.2	10.5	198.1	110.4	87.7	31.4	21.8	9.6
December p	34.7	21.8	12.9	195.8	108.6	87.2	32.4	20.0	12.4
1977 January p	36.9	22.9	14.0	199.0	105.2	93.8	40.1	19.5	20.6
February p	31.2	18.3	12.9	203.9	108.8	95.1	36.1	21.9	14.2
Three monthly totals:									
Dec 1976 to Feb 1977	102.8	63.0	39.8	203.9	108.8	95.1	108.6	61.4	47.2
Sept to Nov 1976	93.5	59.5	34.0	198.1	110.4	87.7	90.3	62.4	27.9
Dec 1975 to Feb 1976	90.1	48.2	41.9	216.2	106.5	109.7	80.3	44.8	35.5
Percentage change latest three months on:									
1 Previous three months	+10	+6	+17	+3	−1	+8	+20	−2	+69
2 A year earlier	+14	+31	−5	−6	+2	−13	+35	+37	+33

p = provisional. r = revised.
* The values for orders outstanding relate to the ends of the periods shown.
Due to rounding, constituent figures may not sum to their respective totals.

TABLE 2 Metal-working machine tools: employment

Thousands

1974	1st quarter	52.9	1975	1st quarter	54.0	1976	1st quarter p 49.6
	2nd quarter	53.2		2nd quarter	53.0		2nd quarter p 49.4
	3rd quarter	54.4		3rd quarter	52.2		3rd quarter p 49.5
	4th quarter	54.4		4th quarter p	50.6		October p 49.7
							November p 49.7
							December p 49.8
						1977	January p 49.9
							February p 49.9

cent lower than a year ago. The recent increase has been entirely in export order books, however; over the last three months export orders-on-hand have increased by 8 per cent, while home order books have eased back a little.

Included in table 2 is a specially prepared estimate of the employment in the industry covered by this article, ie part of MLH 332 concerned with metal-cutting and metal-forming machine tools, but excluding welding equipment. The estimate for February 1977 showed that after having gained a further 100 employees the previous month, employment in the industry levelled out at 49,900, the same as January.

Inquiries on the published series should be addressed to, Department of Industry, Mechanical Engineering Statistics, Room 614, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0651.

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many government statistical publications at your local public library, buy them from HMSO or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

A free pamphlet, *Government Statistics – a brief guide to sources*, gives up-to-date contact points in departments for further information. You can obtain copies from regional offices of the Department of Industry or by writing to the Central Statistical Office Press and Information Service, Great George Street, London SW1P 3AQ.

Release dates of economic statistics to be published in June

Information in the table below is issued by the Central Statistical Office on behalf of the Government Statistical Service and other organisations as a guide to the dates of publication of major economic series in June. The dates are those which departments, or other organisations concerned, are aiming at, and would normally expect to meet. Exceptionally, there may be a delay resulting from unavoidable statistical problems of collection and compilation. Inquiries about individual series should be addressed to the source named.

Publication date	Series	Method of release	Source
June			
1 Wed	Investment intentions of the manufacturing, distributive and service industries (1977 and 1978)	PN	Department of Industry
2 Thurs	Housing starts and completions (Apr)	PN	Department of the Environment
	House renovation grants approved (Apr)		
	UK official reserves (May)	PN	HM Treasury
	Capital issues and redemptions (during the month of May)	PN	Bank of England
	Public sector borrowing requirement and details of local authority borrowing (1st qtr)	PN	CSO
8 Wed	Retail sales (Apr – final)	PN	Department of Trade
	Hire-purchase and other instalment credit business (Apr)	PN	Department of Trade
9 Thurs	Provisional figures of vehicle production and estimates of new car registrations (May)	PN	Department of Industry
	United Kingdom balance of payments (1st qtr)	PN	CSO/ Treasury
10 Fri	Company liquidity survey (1st qtr)	Trade and Industry	Department of Industry
	Usable steel production (May)	PN	BSC/ BISPA
	London clearing banks' monthly statement (mid-May)	PN	CLCB
	UK banks' eligible liabilities, reserve assets, reserve ratios and special deposits (mid-May)	PN	Bank of England
	Building societies receipts and loans (May)	PN	BSA
13 Mon	Wholesale price index numbers (May – prov)	PN	Department of Industry
	Construction – output (1st qtr)	PN	Department of the Environment
14 Tues	Retail sales (May – prov)	PN	Department of Trade
	Central Government financial transactions (including borrowing requirement) (May)	PN	HM Treasury
16 Thurs	UK banking sector statistics (1st qtr)	Bulletin	Bank of England
	Financing of the Central Government Borrowing Requirement (1st qtr)		
	Money stock (1st qtr)		
	Balance of payments current account and overseas trade figures (May)	PN	Department of Trade/ CSO
	UK banks' assets and liabilities and the money stock (mid-May)	PN	Bank of England
	London dollar and sterling certificates of deposit (mid-May)	PN	Bank of England
	Index of industrial production (Apr)	PN	CSO
17 Fri	Retail prices index (May)	PN	Department of Employment
20 Mon	Basic rates of wages and normal weekly hours (May)	PN	Department of Employment
	Monthly index of average earnings (Apr)		
21 Tues	Construction – new orders (Apr)	PN	Department of the Environment
	Unemployment (June – prov)	PN	Department of Employment
	Unfilled vacancies (June – prov)		
22 Wed	New Vehicle registrations (May)	PN	Department of Transport
	Gross domestic product (1st qtr – prov)	PN	CSO
23 Thurs	Finished steel consumption and stock changes (1st qtr – final)	PN	Department of Industry
	Car and commercial vehicle production (May – final)	PN	Department of Industry
24 Fri	Sales and orders in the engineering industries (Mar)	Trade and Industry	Department of Industry
26 Sun	National Savings monthly progress report (May)	PN	National Savings Committee
27 Mon	National Food Survey report on consumption (1st qtr)	PN	MAFF
	Quarterly analysis of bank advances (mid-May)	PN	Bank of England
	Bricks and cement production (May)	PN	Department of the Environment
30 Thurs	Capital expenditure by the manufacturing, distributive and service industries (1st qtr – rev)	PN	Department of Industry
	Manufacturers' and distributors' stocks (1st qtr – rev)	PN	Department of Industry
	Energy Trends	PN	Department of Energy
	Unemployment (May – final)	Gazette	Department of Employment
	Employment in production industries (Apr)		
	Overtime and short-time working in manufacturing industries (Apr)		
	Stoppages of work due to industrial disputes (May)		

PN = Press notice.

Public sector foreign currency debt

The present level, composition and pattern of repayment of the foreign currency debt of the UK public sector are examined in the leading article in the May issue of *Economic Progress Report*.

The amount of this debt outstanding on 1 April 1977 totalled over $22 billion, comprising $11.5 billion in respect of foreign currency debts incurred by the central government (HMG) and $10.7 billion in respect of the foreign currency loans raised by other public sector bodies, including the nationalised industries, local authorities and other statutory authorities.

HMG foreign currency debt includes direct borrowing by HMG in the international financial markets, drawings on IMF facilities, the recent sales of foreign currency bonds, and long-term loans mainly from the United States and Canada. Foreign currency borrowing by the public sector bodies included public bond issues, private placements and bilateral loans, loans from European institutions, and credits from banks or groups of banks.

The largest part of this public sector debt is in US dollars. But the IMF drawings are denominated in special drawing rights (SDRs), and some of the HMG foreign currency bonds and the borrowing by public sector bodies has been in other, mainly European, currencies.

Repayments of this debt will be heaviest in the years 1979 to 1984, with a peak in 1981; in these six years a total of over $17 billion has to be repaid. The bulk of the loans at present outstanding will have been repaid by 1986.

Vehicle production and new car registrations: provisional estimates for April

Provisional estimates of UK vehicle production in the four weeks ending 30 April 1977 are shown in table 1. Table 2 shows provisional estimates for new car registrations in Great Britain.

Inquiries: 01-212 0788.

Table 1 UK vehicle production

	No. of weeks	Passenger cars: Recorded	Passenger cars: Seasonally adjusted (monthly average)	Commercial vehicles: Recorded	Commercial vehicles: Seasonally adjusted (monthly average)
1975	52	1,268	106	380.7	31.7
1976	53	1,333	111	372.1	31.0
1976 April	4	93	111	27.2	30.4
May	4	127	120	34.4	32.9
June	5	130	112	36.2	30.9
July	4	91	131	25.8	33.1
August	4	65	82	18.1	27.3
September	5	98	106	32.0	30.7
October	5	141	111	39.3	30.9
November	4	120	112	33.6	33.6
December	5	110	99	31.7	27.4
1977 January	4	115	119	33.4	37.5
February	4	91	95	32.4	34.0
March	5	112	93	41.0	34.9
April	4	107	126	28.5	31.3
Nov 76-Jan 77			110		32.8
Feb-Apr 77			105		33.4
Percentage change			−5		+2

Turnover of the motor trades: first quarter 1977

The total turnover of the motor trades in the first quarter of 1977 was 22 per cent higher than in the first quarter of 1976. On the same comparison new vehicle sales were 23 per cent higher, used vehicle sales increased by 24 per cent and other sales and receipts (which include sales of petrol and oil, tyres, spares and accessories and receipts from servicing and repairs) rose by 20 per cent.

The statistics are of turnover at current prices. Movements therefore include the effect of price changes, including changes in purchase tax before the second quarter of 1973, the introduction of VAT and car tax from the second quarter of 1973, the introduction of VAT on petrol from the second quarter of 1974, and subsequent changes in the rates of VAT. The turnover includes transactions between dealers in addition to final sales. Vehicles include commercial vehicles as well as private cars and motor cycles.

The estimates for Q4 1976 have been revised to take account of additional information from late returns.

The figures are *not* seasonally adjusted.

The returns made by a voluntary panel are used to project the figures of turnover in a base year (1972) obtained in a comprehensive inquiry to motor traders.

Inquiries: 01-215 3177.

Turnover of the motor trades: index numbers

Index numbers of turnover per quarter at current prices (including purchase tax or VAT and car tax)

Percentage change compared with a year earlier in brackets — 1972 = 100

	Total turnover	New vehicle sales	Used vehicle sales	Other sales
Turnover in 1972 (£ million)	(8,109)	(3,089)	(1,373)	(3,647)
1972	100	100	100	100
1973	111 (+11)	110 (+10)	102 (+2)	115 (+15)
1974	119 (+7)	106 (−3)	100 (−2)	137 (+19)
1975	143 (+20)	123 (+16)	128 (+28)	166 (+21)
1976 (revised)	174 (+22)	159 (+29)	158 (+24)	192 (+16)
1972 1st qtr.	95	94	100	93
2nd qtr.	105	109	107	101
3rd qtr.	102	101	103	104
4th qtr.	98	96	90	102
1973 1st qtr.	117 (+23)	126 (+34)	119 (+18)	109 (+17)
2nd qtr.	110 (+5)	110 (+1)	103 (−3)	113 (+12)
3rd qtr.	114 (+12)	111 (+10)	108 (+5)	119 (+15)
4th qtr.	102 (+4)	93 (−3)	80 (−12)	118 (+16)
1974 1st qtr.	108 (−8)	102 (−20)	87 (−27)	120 (+10)
2nd qtr.	122 (+11)	112 (+2)	106 (+3)	136 (+20)
3rd qtr.	126 (+11)	110 (−1)	111 (+3)	146 (+22)
4th qtr.	121 (+18)	102 (+10)	95 (+20)	147 (+24)
1975 1st qtr.	137 (+27)	127 (+25)	116 (+33)	152 (+27)
2nd qtr.	148 (+21)	129 (+15)	136 (+27)	168 (+23)
3rd qtr.	152 (+21)	131 (+19)	143 (+29)	174 (+19)
4th qtr.	135 (+12)	105 (+3)	117 (+23)	168 (+15)
1976 1st qtr.	166 (+22)	161 (+27)	153 (+32)	175 (+15)
2nd qtr.	176 (+19)	162 (+25)	170 (+26)	189 (+12)
3rd qtr.	178 (+17)	159 (+22)	167 (+17)	199 (+15)
4th qtr. (revised)	176 (+30)	155 (+48)	143 (+22)	205 (+22)
1977 1st qtr.	202 (+22)	199 (+23)	190 (+24)	209 (+20)

Table 2 New GB car registrations

Thousands

	1975	1976	1976 Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	1977 Jan	Feb	Mar	Apr
Recorded	1,167	1,256	116	118	95	53	180	86	96	104	61	112	122	115	105
Seasonally adjusted (monthly average)	97	105	116	110	91	91	115	86	109	119	111	93	118	102	105

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 20 May 1977.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Blind Man's Bluff	BR/E 39141/22/5/82	58	16 May	Childrens Film Foundation Ltd	Willis World Wide Productions Ltd, London
Cafe Bar	BR/E 39152/22/5/82	5	19 May	Fair Enterprises Ltd	Wyatt Cattaneo Productions Ltd, London
Movietone News 2502	BR/E 38863/22/5/82	8	20 May	British Movietonews Ltd	British Movietonews Ltd
			COMMUNITY		
Shattered (Les Passagers)	EC 39143/22/5/82	103	16 May	Columbia-Warner Distributors Ltd	Viaduc Productions, Trianon Productions Paris, and Produzione Intercontinentale Cinematografica, Rome
Strip First Then We Talk	EC 39146/22/5/82	71	17 May	Grand National Film Distributors Ltd	Jarama Film, Rome
The Watchmaker Of Saint Paul	EC 39147/22/5/82	105	17 May	Contemporary Films Ltd	Lira Films, Paris
			FOREIGN		
Mr Billion	F 39140	92	16 May	Twentieth Century-Fox Film Co Ltd	Twentieth Century-Fox Film Corporation, California
For Men Only	F 39142	78	16 May	Grand National Film Distributors Ltd	Swedish Film Productions International, Stockholm
Godzilla Vs The Bionic Monster	F 39144	80	16 May	Lancair Film Distributors Ltd	Toho Towa, Tokyo
Beyond Atlantis	F 39145	90	16 May	Lancair Film Distributors Ltd	Dimension Pictures Inc, California
The Erotic Woman	F 39148	83	17 May	Supreme Film Distributors Ltd	SIFA, Buenos Aires
Passionate Desires	F 39149	81	17 May	Supreme Film Distributors Ltd	SIFA, Buenos Aires
The Cassandra Crossing	F 39150	128	18 May	Twentieth Century-Fox Film Co Ltd	International Cine Productions KG and ICP Film GMBH and Co, Berlin
The Prince And The Pauper	F 39151	121	18 May	Twentieth Century-Fox Film Co Ltd	International Film Productions Inc, Panama
Would You Kill A Child	F 39153	103	20 May	Crawford International Film Distributors Ltd	Penta Films, Madrid
Car Wash	F 39154	97	20 May	Cinema International Corporation Ltd	Universal Pictures, California
Fire	F 39155	97	20 May	Columbia-Warner Distributors Ltd	Warner Bros Inc, California
Crash	F 39156	78	20 May	Columbia-Warner Distributors Ltd	Sequoia Pictures, California

AMENDMENT TO THE REGISTER

The title of the film 'Bloody Virgin', F 39062, registered on 21 March 1977, has been amended to 'Sexuality By The Sea'.

Cinema admissions and takings in February

During February, counted as a four-week period, the weekly average of admissions to cinemas in Great Britain was 2.11 million and the weekly average of gross box office takings was £1.74 million. The comparable figures for February 1976 were 2.15 million and £1.58 million.

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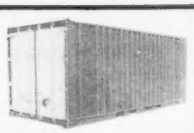

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